National Farm Products Council

Conseil national des produits agricoles

Canada's Poultry and Egg Industry
2002

Canada

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Message from the Chairperson

Inside these pages lies a story of Canadian success, one that is uniquely ours. This is the story of supply management in the poultry and egg industry, and its significant contribution to Canadian agriculture and agri-food.

In this reference guide, you will find numbers, tables and charts that illustrate the work of this dynamic sector. Whether it is by employment, production, or consumption or indeed, by almost any measure found in these pages, the story we tell is one of an industry that benefits every region of Canada.

The National Farm Products Council oversees this system of supply management to ensure that it works in the interests of all stakeholders, from producers through to consumers. This system helps to reduce business risk while ensuring that consumers have access to safe, reasonably-priced, high-quality foods.

The Council works with the four national marketing agencies as well as industry associations to make Canadian agriculture stronger, more competitive and more profitable. We also liaise on an ongoing basis with our provincial and territorial government colleagues.

This guide is an attempt to help Canadians understand the world that lies behind the grocer's display case and the restaurateur's menu. We believe that you will find it informative and helpful.

It is our intention to publish this guide annually. Of course, we welcome your feedback, so that we may improve future editions. You may also contact us to obtain more copies, and to ask questions. You may also wish to contact the four national marketing agencies and associations directly. Their contact information appears on page 48.

Cynthia Currie, Chairperson

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Introduction

Healthy, vibrant and successful – these words sum up the story of the Canadian poultry and egg industry. The sector contributes significantly to Canadian agriculture, with 7% of farm cash receipts, thousands of jobs, and millions of satisfied consumers. Consumption of poultry meat and eggs continues to rise, as Canadians increasingly appreciate these foods for their convenience and nutritional value.

At the heart of the poultry and egg sector lies a system of supply management that is uniquely Canadian. It is a system that is industry-run and supported by federal, provincial and territorial governments. Day-to-day management is the responsibility of four national marketing agencies that operate with the oversight of the National Farm Products Council which reports to the Minister of Agriculture and Agri-Food Canada. The Council reviews agency orders to ensure that the system works as it should.

The following pages provide a great deal of helpful information about the poultry and egg industry. Much of it originates with the four marketing agencies – the Chicken Farmers of Canada, the Canadian Turkey Marketing Agency, the Canadian Egg Marketing Agency and the Canadian Broiler Hatching Egg Marketing Agency and the two industry associations, the Canadian Poultry and Egg Processors Council and the Further Poultry Processors Association of Canada. As well, information to help complete the picture was obtained from Statistics Canada and Agriculture and Agri-Food Canada.

Poultry and Egg Producers

2001

The Western Provinces, including N.W.T., make up 36% of Canada's total poultry and egg producers while 59% are in Central Canada and the remaining 5% are in the Atlantic Region.

Poultry and Egg Producers - 2001

	Chicken	Turkey	Eggs	Broiler Hatching Eggs	Total
B.C.	293	49	138	62	542
Alta.	309	59	180	49	597
Sask.	93	20	67	11	191
Man.	124	67	174	29	394
Ont.	1,134	170	404	85	1,793
Que.	731	136	109	57	1,033
N.B.	34	18	18	4	74
N.S.	83	23	24	3	133
P.E.I.	7	-	15	-	22
Nfld.	7	-	15	-	22
N.W.T.	-	-	2	-	2
Canada	2,815	542	1,146	300	4,803

Source: CFC, CTMA, CEMA, CBHEMA

Farm Cash Receipts
2001

Source: Statistics Canada, CBHEMA

Farm Cash Receipts (FCR) - 2001

($000 000)

	Chicken	Turkey	Eggs	Broiler Hatching Eggs *	Total
B.C.	228.2	27.8	70.6	34.5	326.5
Alta.	132.1	23.7	40.5	22.9	196.4
Sask.	45.4	9.4	21.6	5.2	76.3
Man.	63.3	17.3	61.8	8.0	142.4
Ont.	491.1	114.9	220.6	62.0	826.6
Que.	421.4	58.0	97.0	55.9	576.3
N.B.	44.4	4.2	15.7	x	64.4
N.S.	55.2	6.5	23.7	x	x
P.E.I.	x	x	3.4	x	x
Nfld.	x	x	10.6	x	x
Canada	1,508.1	261.8	565.4	205.2	2,540.5

* Source : Statistics Canada except for Hatching Eggs where FCR are calculated by CBHEMA. x - confidential

Note: Statistics Canada does not publish FCR for the N.W.T.

Poultry and egg receipts totalled $2.5 billion in 2001, making up 7% of total agricultural receipts. Poultry and eggs account for over 10% of total FCR in all provinces except the Prairie Provinces and Prince Edward Island. Chicken receipts accounted for 60% of total poultry and egg FCR in 2001. Feed purchases by the poultry and egg industry were valued in excess of $1 billion.

Production by Province and Territory - 2001

	Chicken (000 kg)	Turkey (000 kg)	Eggs (000 dozen)	Broiler Hatching Eggs (000 eggs)
B.C.	141,060	16,020	57,049	113,318
Alta.	85,767	12,857	34,043	75,006
Sask.	27,690	5,035	18,962	17,168
Man.	39,049	9,701	45,671	26,298
Ont.	299,903	66,158	182,525	203,762
Que.	263,034	32,448	89,814	187,347
N.B.	26,086	2,457	10,282	55,512 *
N.S.	31,879	3,780	17,338	*
P.E.I.	3,264	-	2,596	-
Nfld.	12,413	-	6,962	-
N.W.T.	-	-	2,430	-
Canada	930,145	148,456	467,672	678,411

Source : CFC, CTMA, CEMA, CBHEMA

* For Broiler Hatching Eggs, production for N.B. and N.S. is shown under N.B.

The top producing provinces, for all commodities, are Ontario, Quebec, British Columbia and Alberta.

Hatcheries, Processing Plants and Grading Stations

	Poultry		Eggs		
	Hatcheries	Primary Processing *	Egg Stock Hatcheries	Grading Stations	Egg Processing
B.C.	6	12	2	41	1
Alta.	9	8	8	59	3
Sask.	4	2	2	29	0
Man.	10	6	2	37	2
Ont.	27	65	9	94	9
Que.	16	21	6	43	4
N.B.	2	3	3	18	0
N.S.	3	6	2	15	0
P.E.I.	0	1	0	8	0
Nfld.	1	7	0	7	0
N.W.T.	0	0	0	1	0
Canada	78	131	34	352	19

* Primary Processing includes federally and provincially registered establishments but excludes Hutterite colonies.
Source: Agriculture and Agri-Food Canada, National Farm Products Council

Hatcheries incubate fertilized chicken and turkey eggs to produce chicks and poults. The day-old birds are then raised by producers into either meat-producing or egg-laying birds. Primary processing plants slaughter birds and prepare the meat for the retail market. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat. Egg grading stations prepare eggs for the table market. Egg processing plants (or "breakers") process eggs into liquid and dried form, as well as for pharmaceutical and industrial uses.

Value of Exports

($000 000)

	Chicken	Turkey	Eggs and Egg Products
2001	131.7	18.2	30.7
2000	87.6	13.2	26.1
1999	68.9	10.1	25.3
1998	81.2	10.5	21.4
1997	63.3	13.5	21.5

Source: Statistics Canada

Note : Exports for broiler hatching eggs are minimal.

Combined poultry and egg exports have increased by 85% in the last 5 years. Chicken accounts for almost three quarters of total exports. Exports of chicken have more than doubled in the last 5 years. Most egg exports are not "in the shell", but consist of liquid and dried products. There is an import for re-export program for poultry meat and eggs, under which these products can be imported into Canada for processing into value-added products. These products must subsequently be re-exported. The above exports include meat and egg products of both domestic and US origin.

Value of Imports

($000 000)

	Chicken	Turkey	Eggs and Egg Products	Hatching Eggs & Broiler Chicks
2001	341.4	23.8	30.8	36.3
2000	294.3	18.7	29.9	28.9
1999	272.0	21.1	34.2	33.1
1998	300.1	14.9	36.6	52.0
1997	247.4	11.9	35.1	29.9

Source: Statistics Canada

Import permits for poultry and eggs are administered by the Department of Foreign Affairs and International Trade (DFAIT) under a Tariff Rate Quota (TRQ) system. For each commodity, a level of within-quota access is established according to commitments under multi-lateral and bi-lateral trade agreements. This product may enter at a zero or minimal tariff rate.

There is also an import for re-export program for poultry meat and eggs, under which these products can be imported into Canada for processing into value-added products. These products must subsequently be re-exported. The above imports include meat and egg products imported under this program.

Per Capita Protein Consumption

	Beef (kg)	Chicken (kg)	Pork (kg)	Turkey (kg)	Table Eggs & Egg Products (dozen)
2001	30.7	30.3	28.9	4.2	16.0
2000	32.0	29.0	28.6	4.3	15.7
1999	32.5	27.7	30.1	4.2	15.3
1998	31.8	26.1	28.6	4.3	15.2
1997	31.4	25.4	25.4	4.2	15.1

Source : Statistics Canada

Chicken consumption has increased by almost 20% in the last 5 years. Beef consumption, traditionally the largest meat category, has been stable. Pork consumption has also increased, by 14%. As a result, consumption of the top three meats is now almost equally split. Turkey consumption has remained unchanged. Egg consumption, after falling during the 1980's, has rebounded.

Consumer Price Index (1992=100)

	Chicken	Turkey	Eggs	Beef	Pork	All Foods
2001	116.2	128.4	129.3	128.2	122.4	117.2
2000	110.6	123.9	124.0	111.3	112.1	112.2
1999	110.4	118.5	122.3	104.4	105.4	110.7
1998	108.2	111.1	123.2	102.2	111.6	109.3
1997	109.0	108.5	121.6	102.3	122.6	107.6

Source : Statistics Canada

The Consumer Price Index (CPI) compares, in percentage terms, current prices to prices in the official base period of 1992=100.

For example, the price of all foods in 2001 was 17.2% higher than it was in 1992.

BROILER HATCHING EGGS

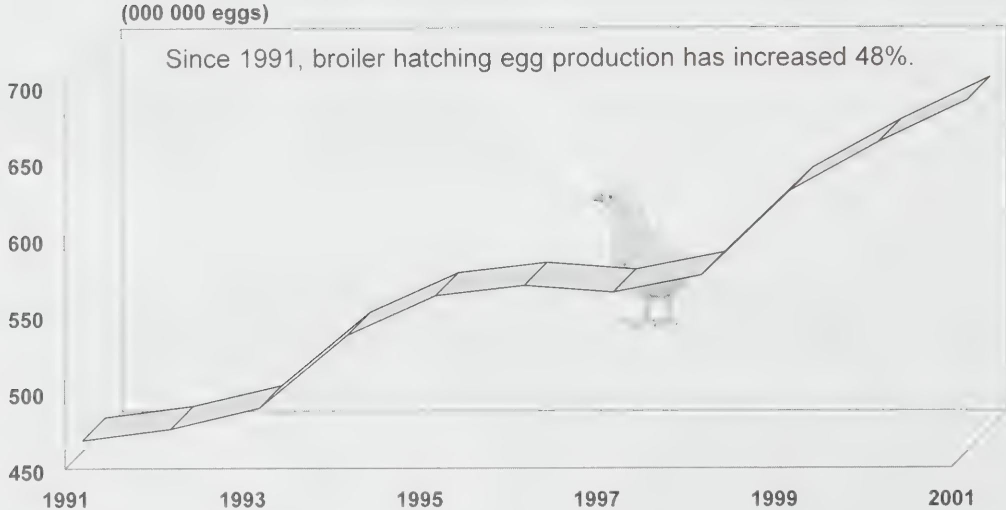
Broiler Hatching Egg Highlights

Canadian Broiler Hatching Egg Marketing Agency (CBHEMA) established in 1986

	2001	2000	1999	1998	1997
Number of Producers	300	300	299	299	300
Farm Cash Receipts ($000 000)	205.2	195.4	183.5	163.6	158.4
Production (000 000 eggs)	678.4	651.1	619.6	564.5	553.4
Imports - Hatching Eggs ($000 000)	28.3	23.3	26.2	41.7	23.9
Imports - Broiler Chicks ($000 000)	8.1	5.5	7.0	10.3	5.9

Broiler Hatching Egg Production

1991 - 2001



Source : CBHEMA

Broiler Hatching Egg Production - 2001

	Production (000 eggs)	Market Share %
B.C.	113,318	16.7
Alta.	75,006	11.1
Sask.	17,168	2.5
Man.	26,298	3.9
Ont.	203,762	30.0
Que.	187,347	27.6
N.B. and N.S.*	55,512	8.2
Canada	678,411	100.0

* combined due to confidentiality

Source : CBHEMA

On a regional basis, the Western Provinces represent 34% of total production, Central Canada 58% and the Atlantic Provinces 8%.

Broiler Hatching Egg Farm Cash Receipts (FCR) - 2001

	FCR ($000)	Share of Broiler Hatching Egg Market %	Broiler Hatching Egg FCR vs Total FCR %
B.C.	34,527	16.8	1.5
Alta.	22,856	11.1	0.3
Sask.	5,190	2.5	0.1
Man.	8,045	3.9	0.2
Ont.	61,985	30.2	0.7
Que.	55,863	27.2	1.0
N.B. and N.S.*	16,781	8.2	2.0
Canada	205,247	100.0	0.6

* combined due to confidentiality

Source : Estimated by CBHEMA

The Western Provinces' farm cash receipts equal 35% of the total, Central Provinces 57% and the Atlantic Provinces 8%.

CHICKEN

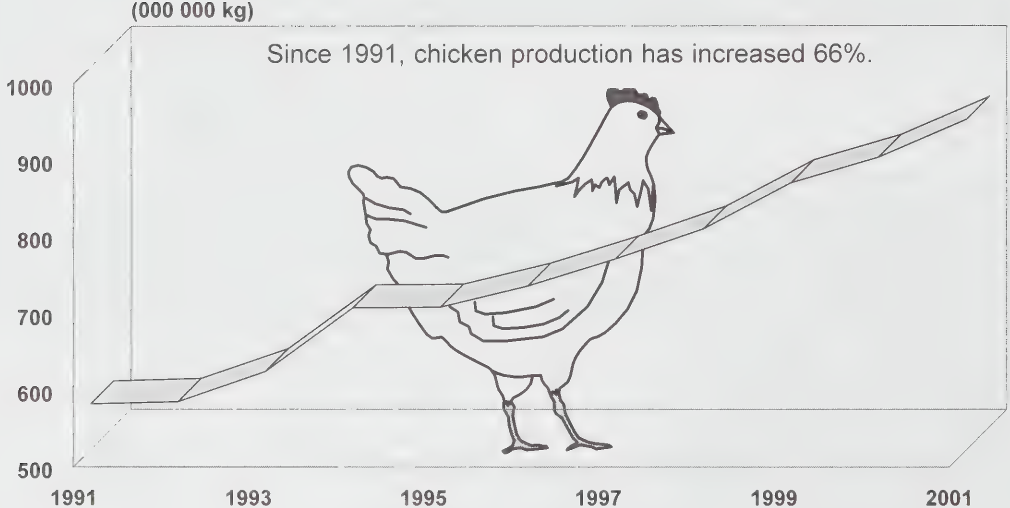
Chicken Highlights

Chicken Farmers of Canada (CFC) established in 1978

	2001	2000	1999	1998	1997
Number of Producers	2,815	2,817	2,859	2,797	2,759
Farm Cash Receipts ($000 000)	1,508.1	1,361.7	1,320.3	1,352.5	1,298.8
Production (000 000 kg)	930.1	880.7	847.6	787.8	748.6
Per Capita Consumption (kg)	30.3	29.0	27.7	26.1	25.4
Consumer Price Index (1992=100)	116.2	110.6	110.4	108.2	109.0
Share of Meat Consumption (%)	30.9	29.6	28.1	27.5	28.0
Exports ($000 000)	131.7	87.6	68.9	81.2	63.3
Imports ($000 000)	341.4	294.3	272.0	300.1	247.4

Chicken Production

1991 - 2001



Source : CFC

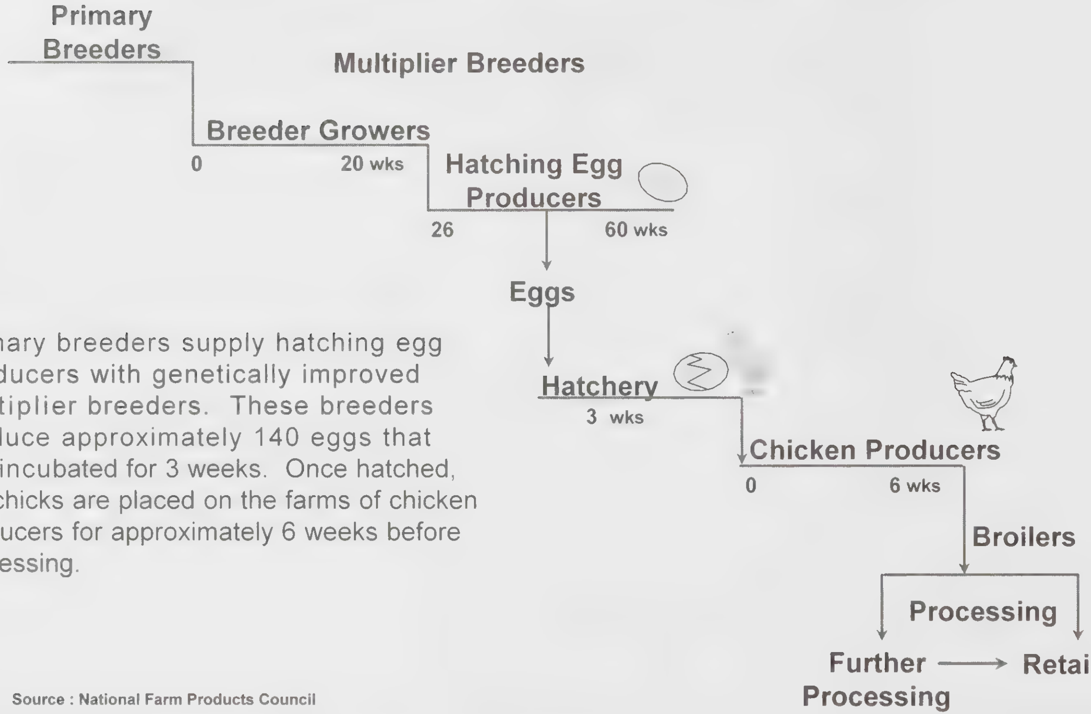
Chicken Production - 2001

	Production (000 kg)	Market Share %
B.C.	141,060	15.2
Alta.	85,767	9.2
Sask.	27,690	3.0
Man.	39,049	4.2
Ont.	299,903	32.2
Que.	263,034	28.3
N.B.	26,086	2.8
N.S.	31,879	3.4
P.E.I.	3,264	0.4
Nfld.	12,413	1.3
Canada	930,145	100.0

Source : CFC

On a regional basis, the Western Provinces represent 32% of total production, Central Canada 60% and the Atlantic Provinces 8%.

Chicken Production Timeline



Primary breeders supply hatching egg producers with genetically improved multiplier breeders. These breeders produce approximately 140 eggs that are incubated for 3 weeks. Once hatched, the chicks are placed on the farms of chicken producers for approximately 6 weeks before processing.

Source : National Farm Products Council

Chicken Farm Cash Receipts (FCR) - 2001

	FCR ($000)	Share of Chicken Market %	Chicken FCR vs Total FCR %
B.C.	228,180	15.1	10.2
Alta.	132,120	8.8	1.6
Sask.	45,350	3.0	0.7
Man.	63,347	4.2	1.7
Ont.	491,060	32.6	5.8
Que.	421,392	27.9	7.4
N.B.	44,440	2.9	10.8
N.S.	55,162	3.7	13.2
P.E.I.	x	x	x
Nfld.	x	x	x
Canada	1,508,066	100.0	4.2

Source : Statistics Canada

x - confidential

The Western Provinces' farm cash receipts equal 31% of the total, Central Provinces 61% and the Atlantic Provinces 8%.

Value of Chicken Exports

	2001 ($000 000)	2001 %	1997 ($000 000)	1997 %
United States	75.6	57.4	12.9	20.4
Cuba	18.0	13.7	18.0	28.4
China	13.8	10.5	12.4	19.6
Hong Kong	4.4	3.3	8.8	13.9
Russia	3.6	2.7	7.2	11.4
Others	16.3	12.4	4.0	6.3
Total	131.7	100.0	63.3	100.0

Source : Statistics Canada

The United States has become an increasingly important market and made up more than half of the value of Canadian exports in 2001.

Most exports to the US are prepared foods such as cooked seasoned chicken wings, breast filets, and dinners. The above exports include meat imported for re-export.

Volume of Chicken Exports - 2001

	(000 000 kg)	%
Whole Bird	2.0	2.5
Breasts	13.6	17.2
Legs	48.3	60.9
Wings	3.0	3.8
Others	12.4	15.6
Total	79.3	100.0

Source : Agriculture and Agri-Food Canada

Chicken exports have increased from 43.3 million kg in 1997 to 79.3 million kg in 2001. Detailed information by cut is not available for 1997. In 2001, the largest export category by weight was legs. An additional 10.4 million kg of further processed products, such as dinners, pies and soups were also exported in 2001.

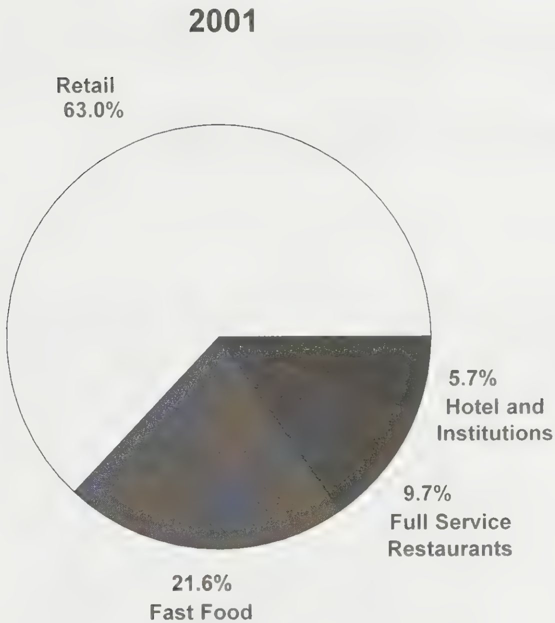
Volume of Chicken Imports

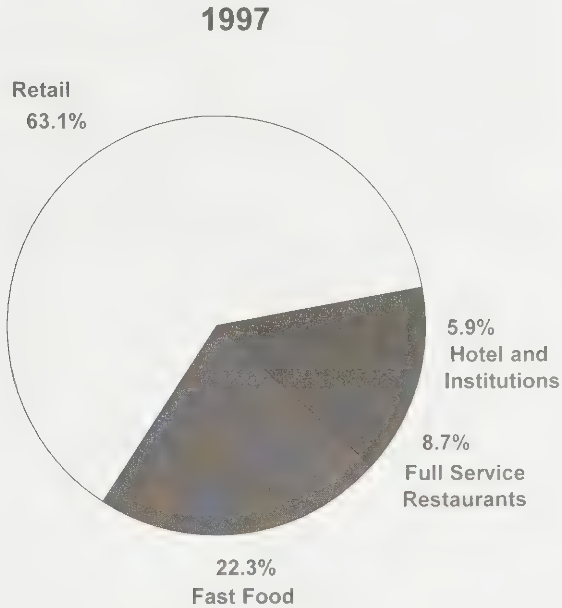
	2001 (000 000 kg)	2001 %	1997 (000 000 kg)	1997 %
Live	-	-	0.7	1.4
Whole Bird	0.2	0.3	1.0	2.0
Breasts	22.5	30.3	17.3	35.2
Parts	15.2	20.5	6.9	14.1
Wings	19.1	25.7	14.8	30.1
Cooked	5.1	6.9	2.4	4.9
Others	12.1	16.3	6.0	12.2
Total	74.2	100.0	49.1	100.0

Source : Agriculture and Agri-Food Canada, actual weight.

The importation of chicken is based on a Tariff Rate Quota (TRQ) system with a NAFTA access level of 7.5% of the previous year's production. Special supplementary permits are issued over and above the TRQ access level. Virtually all of this additional product is for re-export. Product imported for re-export makes up about one quarter of total imports. To date, all chicken meat imports have originated in the US. These imports were valued at $341 million in 2001.

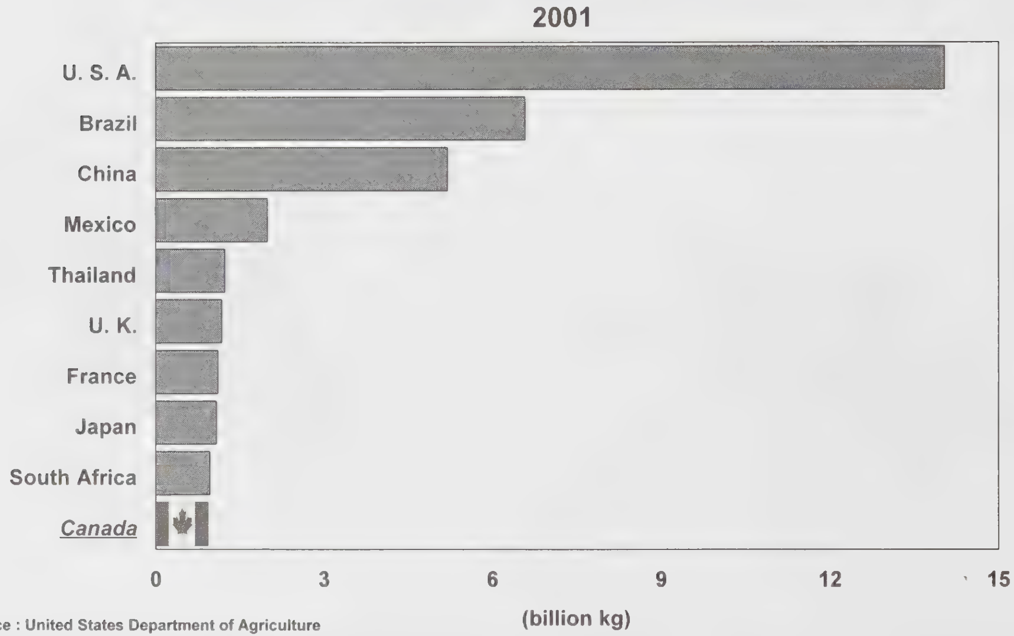
Chicken Consumption by Market Sector





Source : Further Poultry Processors Association of Canada

Largest Chicken Meat Producing Countries



Source : United States Department of Agriculture

TURKEY

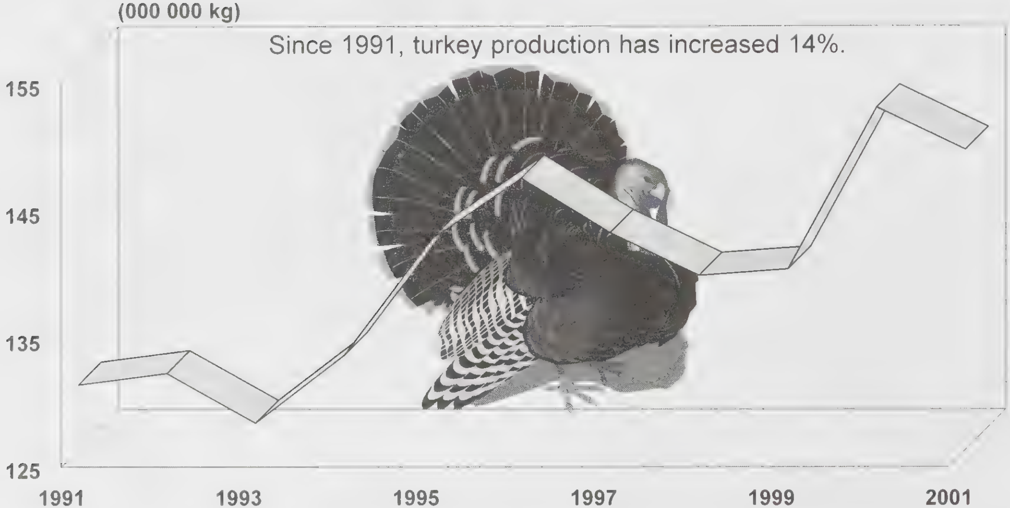
Turkey Highlights

Canadian Turkey Marketing Agency (CTMA) established in 1974

	2001	2000	1999	1998	1997
Number of Producers	542	545	551	558	557
Farm Cash Receipts ($000 000)	261.8	263.3	240.3	248.5	258.6
Production (000 000 kg)	148.5	151.8	139.1	138.6	142
Per Capita Consumption (kg)	4.2	4.3	4.2	4.3	4.2
Consumer Price Index (1992=100)	128.4	123.9	118.5	111.1	108.5
Share of Meat Consumption (%)	4.3	4.4	4.3	4.5	4.6
Exports ($000 000)	18.2	13.2	10.1	10.5	13.5
Imports ($000 000)	23.8	18.7	21.1	14.9	11.9

Turkey Production

1991 - 2001



Source : CTMA

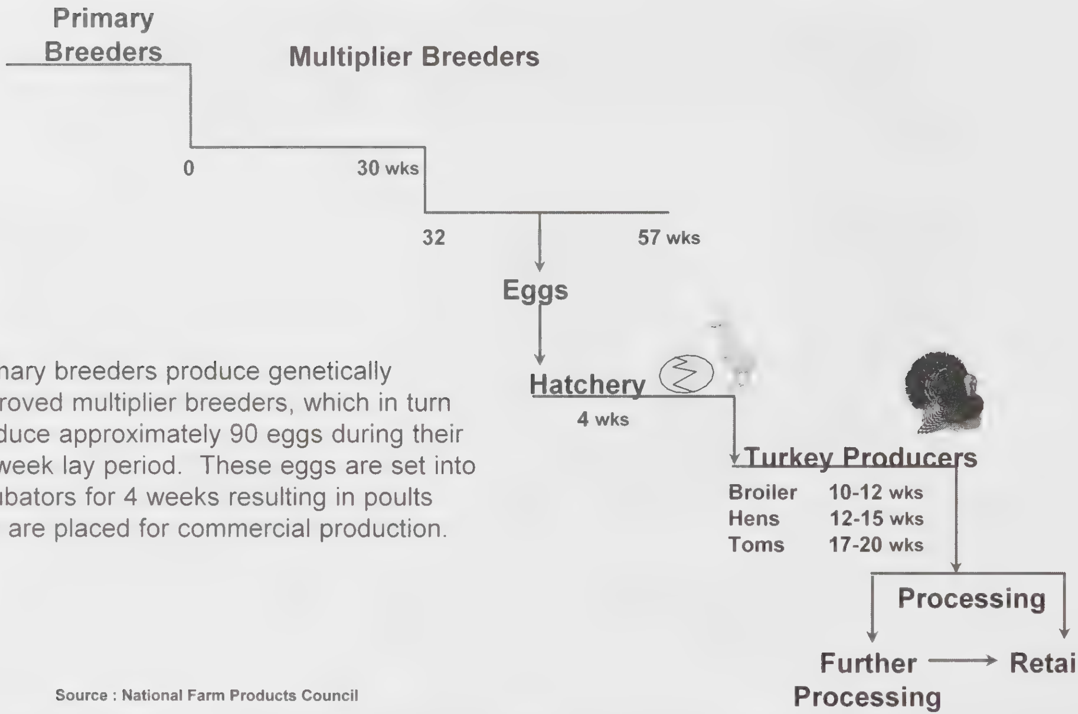
Turkey Production - 2001

	Production (000 kg)	Market Share %
B.C.	16,020	10.8
Alta.	12,857	8.7
Sask.	5,035	3.4
Man.	9,701	6.5
Ont.	66,158	44.6
Que.	32,448	21.9
N.B.	2,457	1.7
N.S.	3,780	2.5
P.E.I.	-	-
Nfld.	-	-
Canada	148,456	100.0

Source : CTMA

On a regional basis, the Western Provinces represent 30% of total production, Central Canada 66% and the Atlantic Provinces 4%.

Turkey Production Timeline



Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 90 eggs during their 25 week lay period. These eggs are set into incubators for 4 weeks resulting in poults that are placed for commercial production.

Source : National Farm Products Council

Turkey Farm Cash Receipts (FCR) - 2001

	FCR ($000)	Share of Turkey Market %	Turkey FCR vs Total FCR %
B.C.	27,778	10.6	1.2
Alta.	23,718	9.1	0.3
Sask.	9,361	3.6	0.1
Man.	17,270	6.6	0.5
Ont.	114,944	43.9	1.3
Que.	57,955	22.1	1.0
N.B.	4,169	1.6	1.0
N.S.	6,497	2.5	1.6
P.E.I.	x	x	x
Nfld.	x	x	x
Canada	261,761	100.0	0.7

Source : Statistics Canada

x - confidential

The Western Provinces' farm cash receipts equals 31% of the total, Central Provinces 61% and the Atlantic Provinces 8%.

Value of Turkey Exports

	2001 ($000 000)	2001 %	1997 ($000 000)	1997 %
United States	5.8	31.9	1.3	9.6
Russia	3.5	19.2	1.7	12.6
South Africa	1.5	8.2	1.6	11.9
Cuba	1.3	7.1	0.7	5.2
Poland	1.1	6.0	0.7	5.2
Others	5.0	27.5	7.5	55.6
Total	18.2	100.0	13.5	100.0

Source : Statistics Canada

The value of turkey exports has increased by $4.7 million (35%) over the last 5 years, in spite of a 16% drop in volume. Increases in exports of value-added turkey products made up virtually all of the rise in value, going from $400 thousand in 1997 to $5.1 million in 2001. The US has become an increasingly important market for turkey, now accounting for almost one third of our exports. Most exports to the US are prepared foods such as dinners and deli meats. The above exports include meat imported for re-export.

Volume of Turkey Exports

	2001 (000 000 kg)	%	1997 (000 000 kg)	%
Live	-	0.0	2.1	10.8
Carcass	0.2	1.2	0.7	3.6
Boneless Parts	6.3	38.4	0.9	4.6
Bone-In Parts	9.5	57.9	10.0	51.3
Others	0.4	2.4	5.8	29.7
Total	16.4	100.0	19.5	100.0

Source : Agriculture and Agri-Food Canada

Turkey exports have decreased 16% from 19.5 million kg in 1997 to 16.4 million kg in 2001. In 2001, the largest export category by weight was legs. These were mainly destined for Russia, Poland and Cuba. An additional 400 thousand kg of futher processed products were also exported in 2001.

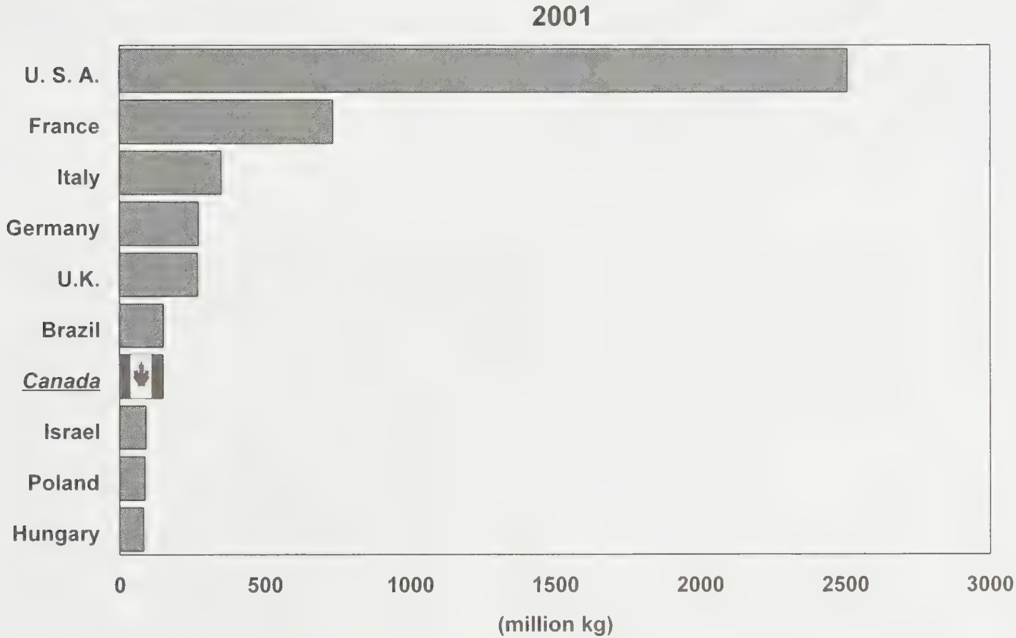
Volume of Turkey Imports

	2001 (000 000 kg)	%	1997 (000 000 kg)	%
Live	-	-	0.9	20.0
Boneless- Breasts	1.9	54.3	1.0	22.2
Boneless - Other	1.1	31.4	0.5	11.1
Boneless - Cooked	0.3	8.6	0.2	4.4
Bone-In Parts	0.2	5.7	1.3	28.9
Others	-	-	0.6	13.3
Total	3.5	100.0	4.5	100.0

Source : Agriculture and Agri-Food Canada, actual weight.

The importation of turkey is based on a Tariff Rate Quota (TRQ) system with a WTO access level of 5.6 million kg eviscerated weight basis. Special supplementary permits are issued over and above the TRQ access level. Virtually all of this additional product is for re-export. Product imported for re-export makes up about one fifth of total imports. To date, all turkey meat imports have originated in the US. These imports were valued at $24 million in 2001.

Largest Turkey Meat Producing Countries



Source : United States Department of Agriculture

EGGS

Egg Highlights

Canadian Egg Marketing Agency (CEMA) established in 1972

	2001	2000	1999	1998	1997
Number of Producers	1,146	1,147	1,157	1,216	1,275
Farm Cash Receipts ($000 000)	565.4	513.6	484.1	473.2	487.2
Production (000 000 dozen)	467.7	454.9	441.7	429.5	422.3
Per Capita Consumption (dozen)	16.0	15.7	15.3	15.2	15.1
Consumer Price Index (1992=100)	129.3	124.0	122.3	123.2	121.6
Exports ($000 000)	30.7	26.1	25.3	21.4	21.5
Imports ($000 000)	30.8	29.9	34.2	36.6	35.1

Egg Production

1991 - 2001

Source : 1991-1993 : Agriculture and Agri-Food Canada
1994-2001 : CEMA

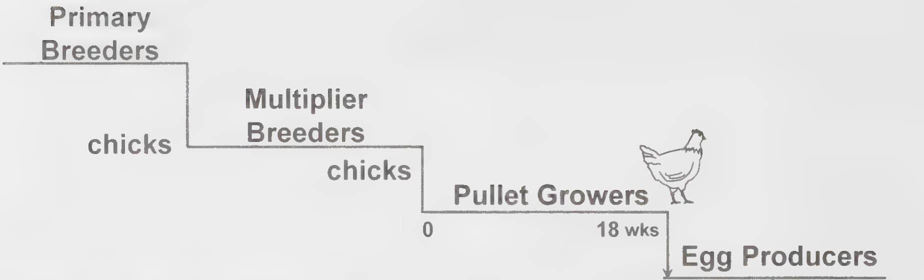
Egg Production - 2001

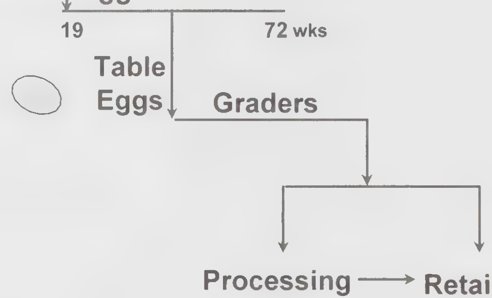
	Production (000 dozen)	Market Share %
B.C.	57,049	12.2
Alta.	34,043	7.3
Sask.	18,962	4.1
Man.	45,671	9.8
Ont.	182,525	39.0
Que.	89,814	19.2
N.B.	10,282	2.2
N.S.	17,338	3.7
P.E.I.	2,596	0.6
Nfld.	6,962	1.5
N.W.T.	2,430	0.5
Canada	467,672	100.0

Source : CEMA

On a regional basis, the Western Provinces (including Northwest Territories) represent 34% of total production, Central Canada 58% and the Atlantic Provinces 8%.

Egg Production Timeline





Primary breeders maintain and expand pure bloodlines and develop cross-bred bloodlines. The eggs they produce are hatched into multiplier breeders. Multiplier breeders produce eggs which, when hatched, are grown to the age of 18 weeks by pullet growers. At 19 weeks, the pullets are placed in egg producers' barns where they begin to produce eggs for the retail and processed markets.

Source : National Farm Products Council

Egg Farm Cash Receipts (FCR) - 2001

	FCR ($000)	Share of Egg Market %	Egg FCR vs Total FCR %
B.C.	70,559	12.5	3.2
Alta.	40,515	7.2	0.5
Sask.	21,577	3.8	0.3
Man.	61,826	10.9	1.7
Ont.	220,580	39.0	2.6
Que.	96,964	17.1	1.7
N.B.	15,746	2.8	3.8
N.S.	23,709	4.2	5.7
P.E.I.	3,380	0.6	1.0
Nfld.	10,580	1.9	13.1
Canada	565,436	100.0	1.6

Source : Statistics Canada

Note : Statistics Canada does not publish FCR for N.W.T.

The Western Provinces' farm cash receipts equal 35% of the total, Central Provinces 56% and the Atlantic Provinces 9%.

Value of Egg Product Exports

	2001		1997	
	($000 000)	%	($000 000)	%
Japan	16.1	52.4	10.9	50.7
United States	7.7	25.1	4.7	21.9
Venezuela	2.3	7.5	0.4	1.9
Others	4.6	15.0	5.5	25.6
Total	30.7	100.0	21.5	100.0

Source : Statistics Canada

Japan remains our major market for egg product exports, accounting for over half by value. These exports include eggs and egg products imported for re-export. Canada exports virtually no shell eggs.

Value of Egg Product Exports - by Category

	2001 ($000 000)	%	1997 ($000 000)	%
Whole Egg - Liquid/Frozen	1.4	4.5	3.2	14.8
Whole Egg - Dried	5.2	16.8	2.2	10.2
Egg Albumen - Liquid/Frozen	1.2	4.0	0.7	3.1
Egg Albumen - Dried	10.9	35.5	8.0	37.2
Egg Yolks - Liquid/Frozen	5.9	19.3	1.4	6.3
Egg Yolks - Dried	6.1	19.9	6.1	28.4
Total	30.7	100.0	21.5	100.0

Note : Exports of shell eggs are minimal.

Source : Statistics Canada

Dried egg albumen accounts for one third of total exports. Eggs and egg products imported for re-export are included in all of these products.

Value of Egg Imports

	2001 ($000 000)	2001 %	1997 ($000 000)	1997 %
Whole Egg - Liquid/Frozen	4.2	13.6	2.5	7.3
Whole Egg - Dried	0.8	2.7	2.9	8.3
Egg Albumen - Liquid/Frozen	1.4	4.5	3.7	10.6
Egg Albumen - Dried	1.3	4.2	2.0	5.6
Egg Yolks - Liquid/Frozen	2.6	8.4	6.1	17.2
Egg Yolks - Dried	0.7	2.2	0.7	1.9
Egg Preparation	2.8	9.1	1.1	3.0
Shell Eggs	17.0	55.3	16.2	46.1
Total	30.8	100.0	35.1	100.0

Source : Statistics Canada

The import access level under Canada's WTO commitment is 21,370,000 dozen (egg equivalent). In 2001, 23.6 million dozen shell eggs and 7.9 million kg of egg products were imported. With respect to egg product imports, 40% were imported for re-export.

CEMA's Industrial Product Volumes

(000 dozen)

	2001	1997
B.C.	12,434	7,857
Alta.	4,311	2,810
Sask.	3,178	2,889
Man.	25,960	25,248
Ont.	33,573	29,515
Que.	10,122	2,787
N.B.	2,358	1,523
N.S.	6,145	4,785
P.E.I.	980	741
Nfld.	2,173	1,605
N.W.T.	1,716	- *
Canada	102,951	79,761

Source : CEMA

* N.W.T. was not part of the national system in 1997.

Industrial product refers to eggs that are in excess of local or provincial requirements for the table market. These eggs are sold by CEMA to egg processors for the production of dried, liquid and cooked eggs. Since 1997, the quantity of eggs declared as industrial product has increased 29%, mainly due to increased demand for processed egg products.

Processed Egg Production

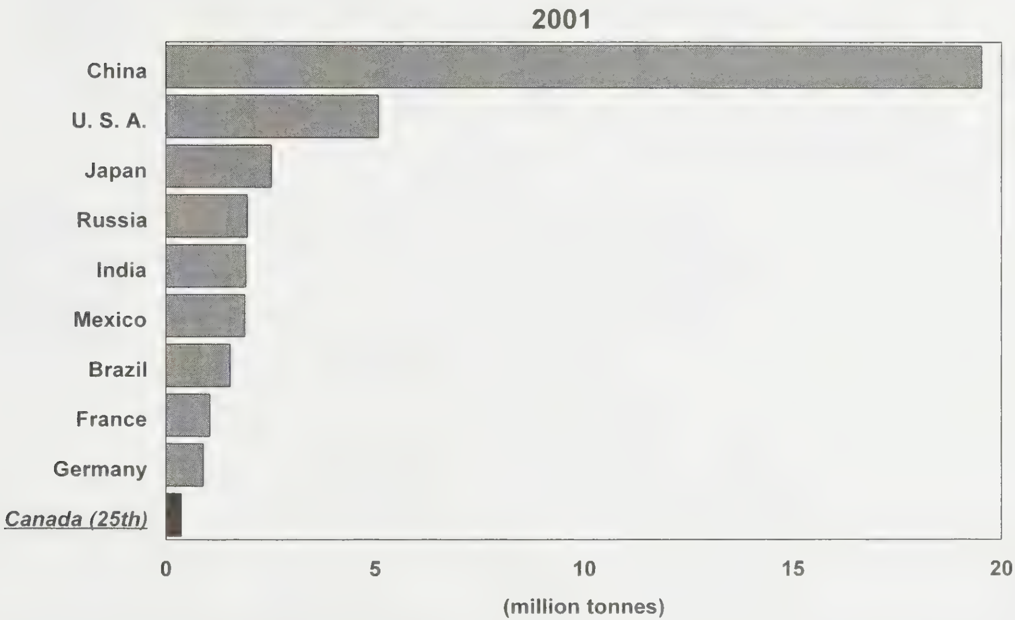
(000 000 kg liquid equivalent)

	2001	1997
Whole Egg	39.3	28.2
Yolk	13.5	7.2
Albumen	24.8	13.2

Source : Agriculture and Agri-Food Canada

Processed egg production is up 60% since 1997. Whole egg production increased 39% while both yolk and albumen production increased 88%.

Largest Egg Producing Countries



Source : Food and Agriculture Organization of the United Nations

Industry Contacts

Chicken Farmers of Canada
350 Sparks St., Suite 1007
Ottawa, Ontario
K1R 7S8
Phone: (613) 241-2800
Fax: (613) 241-5999
Website: www.chicken.ca
Contact: Mr. Mike Dungate, General Manager

Canadian Turkey Marketing Agency
969 Derry Road, Unit 102
Mississauga, Ontario
L5T 2J7
Phone: (905) 564-3100
Fax: (905) 564-9356
Website: www.canadianturkey.ca
Contact: Mr. Phil Boyd, Executive Director

CTMA
OCCD

Canadian Egg Marketing Agency
1501 - 112 Kent Street
Ottawa, Ontario
K1P 5P2
Phone: (613) 238-2514
Fax: (613) 238-1967
Website: www.canadaegg.ca

Canadian Poultry and Egg Processors Council
1545 Carling Avenue, Suite 400
Ottawa, Ontario
K1Z 8P9
Phone: (613) 724-6605
Fax: (613) 724-4577
Website: www.cpepc.ca
Contact: Mr. Bob Anderson, President and CEO

Canadian Broiler Hatching Egg Marketing Agency
75 Albert Street, Suite 1101
Ottawa, Ontario
K1P 5E7
Phone: (613) 232-3023
Fax: (613) 232-5241
Website: www.cbhema.com
Contact: Mr. Errol Halkai, General Manager

Canadian Broiler Hatching Egg Marketing Agency
Office canadien de commercialisation des oeufs d'incubation de poulet à chair

Further Poultry Processors Association of Canada
2525 St. Laurent Blvd., Suite 203
Ottawa, Ontario
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Phone: (613) 738-1175
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Website: www.sympatico.ca/fppac
Contact: Mr. Robert de Valk, General Manager

fppac

Canada

National Farm Products Council

Conseil national des produits agricoles

Canada's Poultry and Egg Industry 2003

Canada

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Comments and suggestions:

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Email: nfpcweb@agr.gc.ca **Fax:** 613-995-2097 **Mail:** NFPC, 344 Slater St., 10th floor, Ottawa, ON K1R 7Y3

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Introduction

Welcome to the second edition of *Canada's Poultry and Egg Industry* handbook. This reference guide uses data obtained from industry and government, and tells a tale of success in meeting Canadians' needs for high-quality, reasonably priced poultry meat and eggs.

This success can be measured in millions of kilograms of poultry meat and in millions of eggs. It can also be measured in jobs and incomes. Thousands of Canadians earn their living in producing and processing chicken, turkey, and eggs. The industry creates opportunities for Canadians in every region.

Nationally, the system is run by four marketing agencies–the Canadian Egg Marketing Agency, the Canadian Turkey Marketing Agency, the Chicken Farmers of Canada and the Canadian Broiler Hatching Egg Marketing Agency.

The National Farm Products Council (NFPC) oversees the four marketing agencies to ensure that they operate in the balanced interest of producers and consumers. The NFPC reviews agency orders and regulations, hears complaints about agency decisions, and provides advice about the agencies to the Minister of Agriculture and Agri-food.

At the provincial/territorial level, commodity marketing boards which represent producers are supervised by their governments.

Please feel free to contact us should you require additional copies of this handbook or have any questions. The Government of Canada, through the National Farm Products Council, is a strong supporter of our poultry and egg producers and processors.

Poultry and Egg Producers

2002

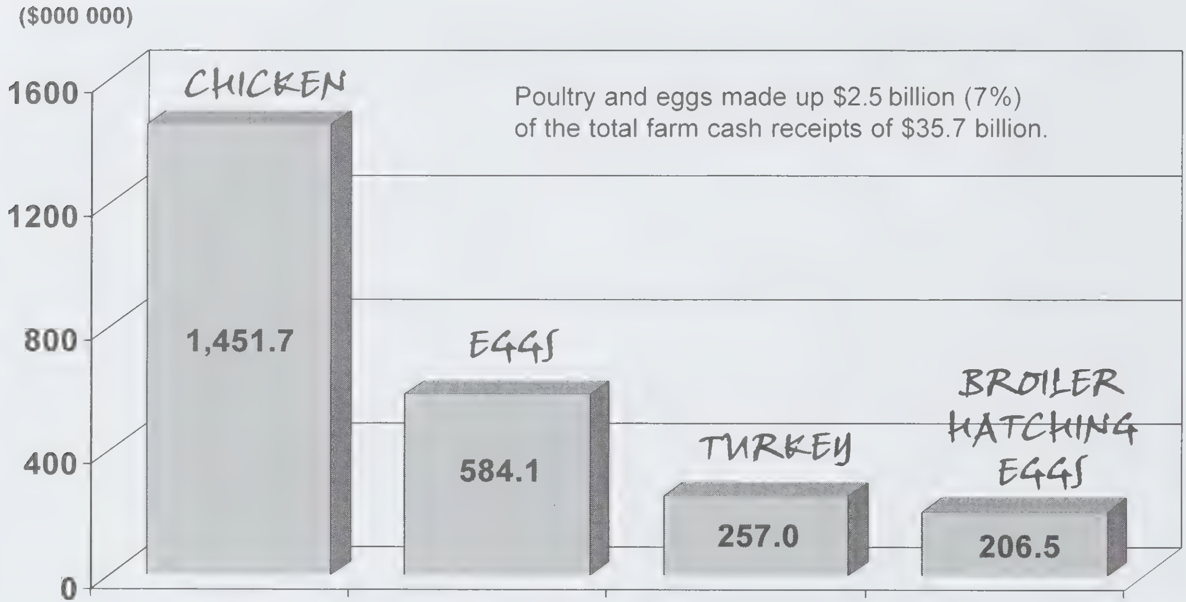
The Western Provinces, including N.W.T., make up 36% of Canada's total poultry and egg producers while 59% are in Central Canada and the remaining 5% are in the Atlantic Region.

Number of Poultry and Egg Producers - 2002

	Chicken	Turkey	Eggs	Broiler Hatching Eggs	Total
B.C.	336	48	133	62	579
Alta.	290	63	169	48	570
N.W.T.	-	-	2	-	2
Sask.	93	17	66	11	187
Man.	124	66	171	30	391
Ont.	1,123	181	408	85	1,797
Que.	752	140	111	59	1,062
N.B.	35	18	18	3	74
N.S.	84	23	24	1	132
P.E.I.	7	-	14	-	21
Nfld.	7	-	12	-	19
Canada	2,851	556	1,128	299	4,834

Source: CFC, CTMA, CEMA, CBHEMA

Farm Cash Receipts
2002



Source: Statistics Canada, CBHEMA

Farm Cash Receipts (FCR) - 2002

($000 000)

	Chicken	Turkey	Eggs	Broiler Hatching Eggs *	Total	Poultry and Egg vs Total Provincial FCR (%)
B.C.	231.1	26.5	75.2	33.5	366.3	16.7
Alta.	122.8	21.1	42.4	22.5	208.7	2.5
Sask.	46.9	8.9	23.2	4.8	83.8	1.3
Man.	61.2	17.0	64.9	9.4	152.5	4.1
Ont.	471.8	116.6	223.2	65.1	876.7	10.3
Que.	404.4	56.1	102.8	55.0	618.3	11.3
N.B.	37.1	4.4	14.5	16.2 *	x	N/A
N.S.	50.9	6.2	23.4	x	x	N/A
P.E.I.	x	x	3.5	x	x	N/A
Nfld.	x	x	11.1	x	x	N/A
Canada	1,451.7	257.0	584.1	206.5	2,499.3	7.0

Source : Statistics Canada except for Hatching Eggs where FCR are calculated by CBHEMA.

* N.B. and N.S. combined due to confidentiality

Note : Statistics Canada does not publish FCR for the N.W.T.

x - confidential

Poultry and egg receipts totalled $2.5 billion in 2002, making up 7% of total agricultural receipts. The three largest provinces, Quebec, Ontario and British Columbia, accounted for almost three quarters of poultry and egg receipts. Chicken receipts made up 63% of the total in 2002. Feed purchases by the poultry and egg industry were valued in excess of $1 billion.

Production by Province and Territory - 2002

	Chicken (000 kg)	Turkey (000 kg)	Eggs (000 dozen)	Broiler Hatching Eggs (000 eggs)
B.C.	147,266	15,403	59,421	113,764
Alta.	83,970	11,509	39,413	74,104
N.W.T.	-	-	2,447	-
Sask.	30,022	4,664	19,873	15,999
Man.	38,860	9,714	54,777	30,649
Ont.	303,548	67,005	185,624	213,826
Que.	262,147	31,155	93,562	184,874
N.B.	25,827	2,544	10,501	53,136 *
N.S.	31,939	3,695	17,924	*
P.E.I.	3,343	-	3,031	-
Nfld.	12,014	-	7,580	-
Canada	938,936	145,689	494,153	686,352

Source : CFC, CTMA, CEMA, CBHEMA

* For Broiler Hatching Eggs, production for N.B. and N.S. is shown under N.B.

The top producing provinces, for all commodities, are Ontario, Quebec and British Columbia.

Hatcheries, Processing Plants and Grading Stations

	Poultry		Eggs		
	Hatcheries	Primary Processing *	Egg Stock Hatcheries	Grading Stations	Egg Processing
B.C.	6	12	2	40	1
Alta.	9	8	8	53	3
N.W.T./Yukon	0	0	0	2	0
Sask.	4	2	2	27	0
Man.	10	6	2	36	2
Ont.	27	65	9	94	9
Que.	16	21	6	43	4
N.B.	2	3	3	18	0
N.S.	3	6	2	15	0
P.E.I.	0	1	0	7	0
Nfld.	1	7	0	6	0
Canada	78	131	34	341	19

* Primary Processing includes federally and provincially registered establishments but excludes Hutterite colonies.

Source: Agriculture and Agri-Food Canada, National Farm Products Council

Hatcheries incubate fertilized chicken and turkey eggs to produce chicks and poults. The day-old birds are then raised by producers into either meat-producing or egg-laying birds. Primary processing plants slaughter birds and prepare the meat for the retail market. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat. Egg grading stations prepare eggs for the table market. Egg processing plants (or "breakers") process eggs into liquid and dried form, as well as for pharmaceutical and industrial uses.

Value of Exports and Imports

($000 000)

	Chicken		Turkey		Eggs and Egg Products		Hatching Eggs & Broiler Chicks	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
2002	151.6	353.4	17.1	26.5	41.7	31.5	*	35.2
2001	131.7	341.4	18.2	23.8	30.7	30.7	*	36.3
2000	87.6	294.3	13.2	18.7	26.1	29.9	*	28.9
1999	68.9	272.0	10.1	21.1	25.3	34.2	*	33.1
1998	81.2	300.1	10.4	14.9	21.4	36.6	*	52.0

Source: Statistics Canada

* Exports for broiler hatching eggs are minimal.

There is an import for re-export program for poultry meat and eggs, under which these products can be imported into Canada for processing into value-added products. These products must subsequently be re-exported. The above exports and imports include meat and egg products of both domestic and foreign origin.

Exports

Poultry and egg exports were valued at $210.4 million in 2002, up 86% from five years ago. Chicken has consistently accounted for 72% of the total in the last five years and increased by 86% as well. Turkey exports made up 8% of the total, and egg products 20% in 2002. Most egg exports are not "in the shell", but consist of liquid and dried products.

The U.S. is our number one market for poultry and egg products (55% of total), ranking first for chicken and egg products and second for turkey. Our second largest market is Russia, which ranks first for turkey and third for chicken.

Imports

Imports of poultry and eggs were valued at $446.6 million in 2002, up 11% from five years ago. Chicken made up 80% of the total, turkey 6%, eggs 7% and hatching eggs 7%. The U.S. was the source for almost all poultry and egg imports (99.5%). Thailand was the next largest supplier (0.4%). Imports from the U.S. were predominantly fresh chicken parts (breasts and wings) and further processed products such as chicken and turkey dinners.

Import permits for poultry and eggs are administered by the Department of Foreign Affairs and International Trade (DFAIT) under a Tariff Rate Quota (TRQ) system. For each commodity, a level of within-quota access is established according to commitments made under multi-lateral and bi-lateral trade agreements. This product may enter at a zero or minimal tariff rate, depending on the agreement.

Per Capita Protein Consumption

	Beef (kg)	Chicken (kg)	Pork (kg)	Turkey (kg)	Table Eggs & Egg Products (dozen)
2002	30.0	30.6	28.1	4.3	15.4
2001	30.6	30.4	28.9	4.2	15.8
2000	31.9	29.0	28.6	4.2	15.7
1999	32.5	27.7	30.0	4.2	15.2
1998	31.8	26.1	28.6	4.3	15.1

Source : Statistics Canada

Chicken consumption has increased by 17.2% in the last 5 years. Beef consumption, traditionally the largest meat category, has now been replaced by chicken. Pork consumption has been stable for the past 5 years. As a result, consumption of the top three meats is now almost equally split. Turkey consumption has remained unchanged. Egg consumption, while declining slightly in 2002, has been recovering steadily after falling during the 1980's.

Consumer Price Index (1992=100)

	Chicken	Turkey	Eggs	Beef	Pork	All Foods
2002	116.7	131.4	133.9	132.8	118.8	120.3
2001	116.2	128.4	129.3	128.2	122.4	117.2
2000	110.6	123.9	124.0	111.3	112.1	112.2
1999	110.4	118.5	122.3	104.4	105.4	110.7
1998	108.2	111.1	123.2	102.2	111.6	109.3

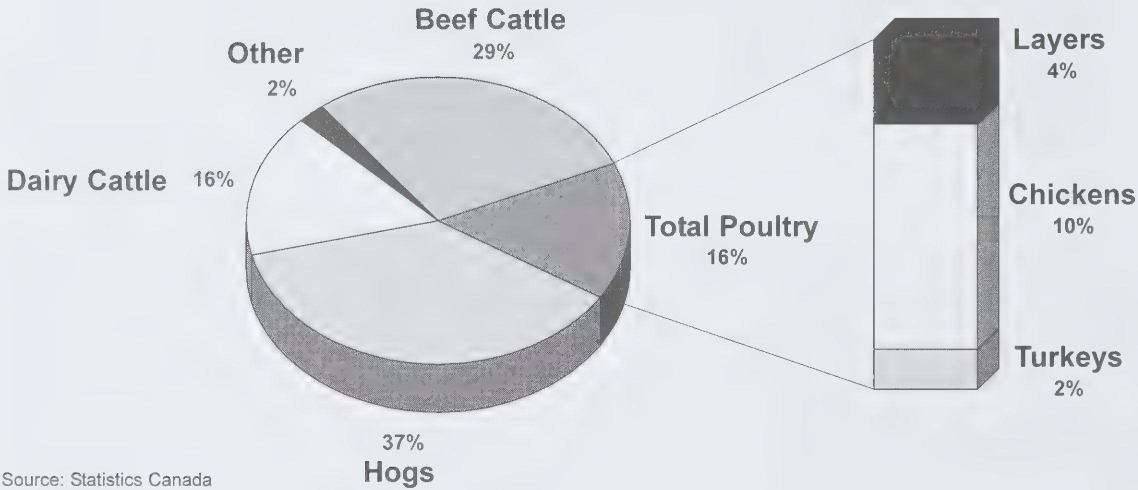
Source : Statistics Canada

The Consumer Price Index (CPI) compares, in percentage terms, current prices to prices in the official base period of 1992=100.

For example, the price of all foods in 2002 was 20.3% higher than it was in 1992.

Livestock Grain-Based Feed Requirements

2001



Source: Statistics Canada

The Canadian livestock and poultry industry used 24.3 million tonnes of complete grain-based rations in 2001. Of this, 16% was fed to chickens, layers and turkeys.

BROILER HATCHING EGGS

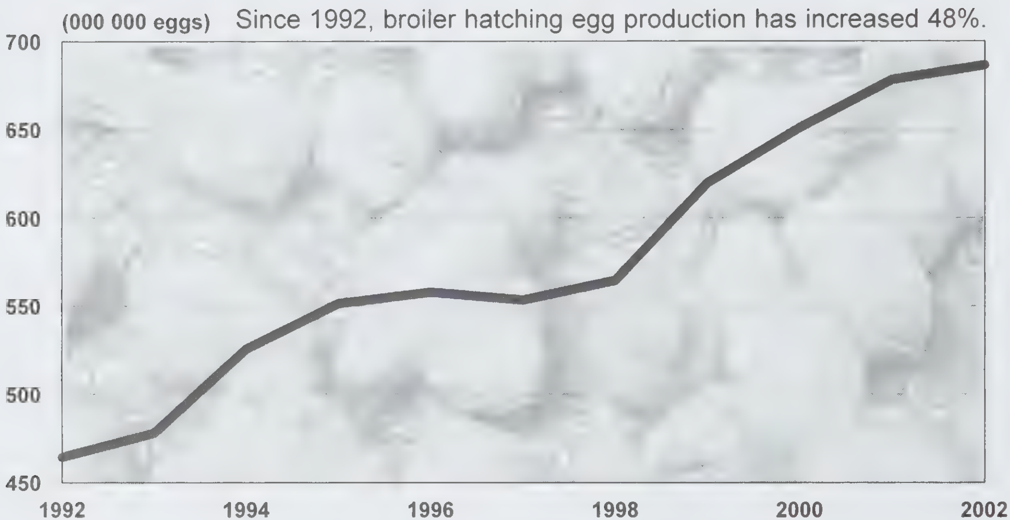
Broiler Hatching Egg Highlights

Canadian Broiler Hatching Egg Marketing Agency (CBHEMA) established in 1986

	2002	2001	2000	1999	1998
Number of Producers	299	300	300	299	299
Farm Cash Receipts ($000 000)	206.5	205.2	195.4	183.5	163.6
Production (000 000 eggs)	686.4	678.4	651.1	619.6	564.5
Imports - Hatching Eggs ($000 000)	27.4	28.3	23.4	26.2	41.7
Imports - Broiler Chicks ($000 000)	7.8	8.0	5.5	6.9	10.3

Broiler Hatching Egg Production

1992 - 2002



Source : CBHEMA

Broiler Hatching Egg Production - 2002

	Production (000 eggs)	Market Share %
B.C.	113,764	16.6
Alta.	74,104	10.8
Sask.	15,999	2.3
Man.	30,649	4.5
Ont.	213,826	31.2
Que.	184,874	26.9
N.B. and N.S.*	53,136	7.7
Canada	686,352	100.0

West	234,516	34.2
Central	398,700	58.1
East	53,136	7.7

Source : CBHEMA

*combined due to confidentiality

Hatching Egg Farm Cash Receipts (FCR) - 2002

	FCR ($000)	Share of Broiler Hatching Egg Market %	Broiler Hatching Egg FCR vs Total FCR %
B.C.	33,509	16.2	1.5
Alta.	22,460	10.9	0.3
Sask.	4,849	2.3	0.1
Man.	9,376	4.5	0.2
Ont.	65,099	31.5	0.8
Que.	55,035	26.7	1.0
N.B. and N.S.*	16,177	7.8	1.3
Canada	206,505	100.0	0.6
West	70,194	34.0	0.3
Central	120,134	58.2	0.9
Atlantic	16,177	7.8	1.3

Source : Estimated by CBHEMA

* combined due to confidentiality

CHICKEN

Chicken Highlights

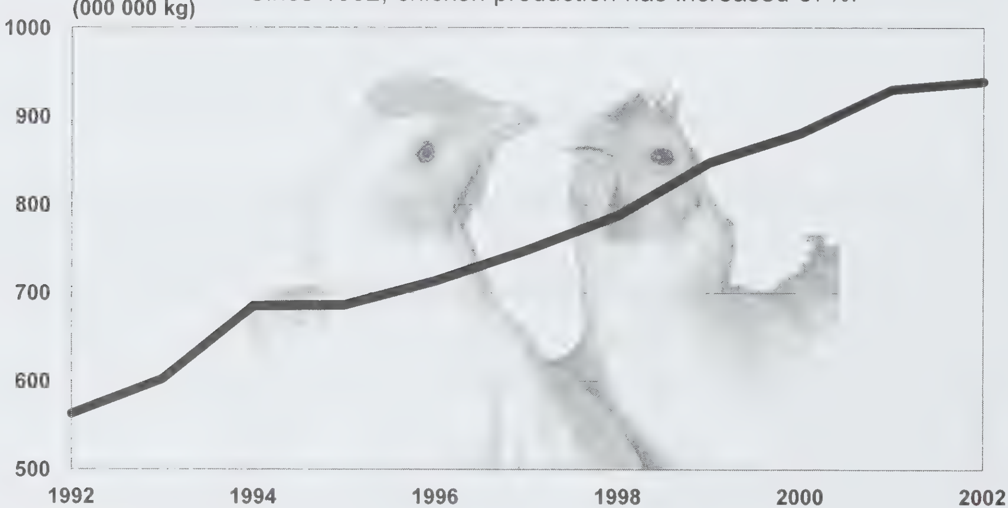
Chicken Farmers of Canada (CFC) established in 1978

	2002	2001	2000	1999	1998
Number of Producers	2,851	2,815	2,817	2,859	2,797
Farm Cash Receipts ($000 000)	1,451.7	1,508.1	1,361.7	1,320.3	1,352.5
Production (000 000 kg)	938.9	930.1	880.7	847.6	787.8
Per Capita Consumption (kg)	30.6	30.4	29.0	27.7	26.1
Consumer Price Index (1992=100)	116.7	116.2	110.6	110.4	108.2
Share of Meat Consumption (%)	31.6	31.0	29.7	28.1	27.5
Exports ($000 000)	151.6	131.7	87.6	68.9	81.2
Imports ($000 000)	353.4	341.4	294.3	272.0	300.1

Chicken Production

1992 - 2002

Since 1992, chicken production has increased 67%.



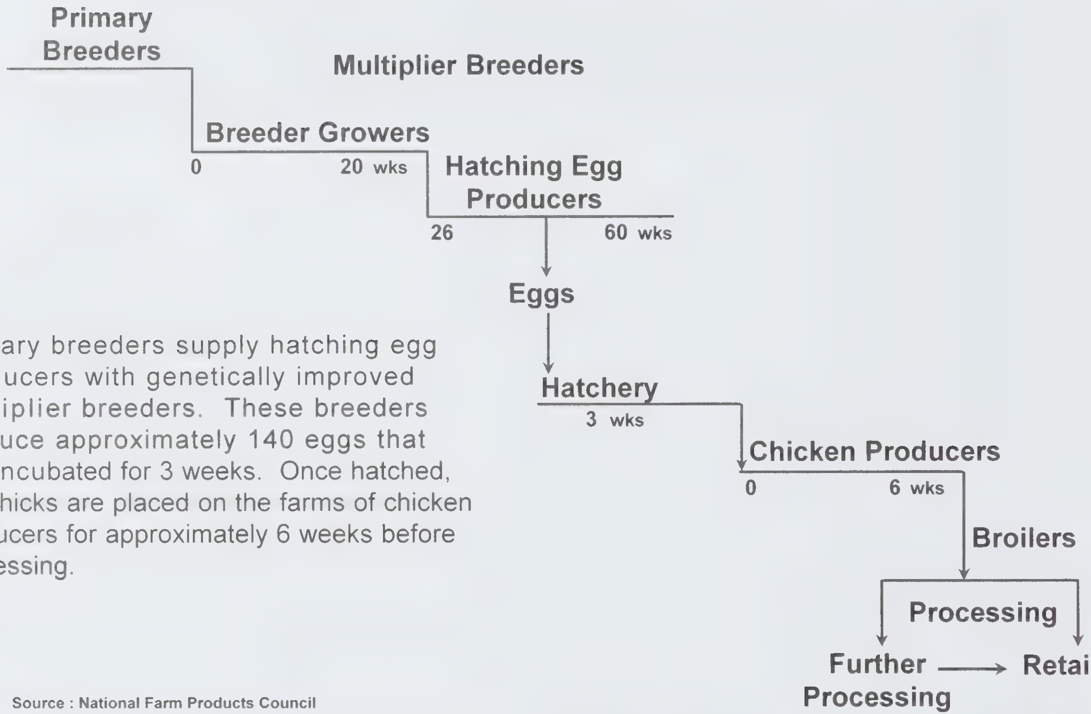
Source : 1992-1997 Agriculture and Agri-Food Canada
1998-2002 CFC

Chicken Production - 2002

	Production (000 kg)	Market Share %
B.C.	147,266	15.7
Alta.	83,970	8.9
Sask.	30,022	3.2
Man.	38,860	4.1
Ont.	303,548	32.3
Que.	262,147	27.9
N.B.	25,827	2.8
N.S.	31,939	3.4
P.E.I.	3,343	0.4
Nfld.	12,014	1.3
Canada	938,936	100.0
West	300,118	32.0
Central	565,695	60.2
East	73,123	7.8

Source : CFC

Chicken Production Timeline



Primary breeders supply hatching egg producers with genetically improved multiplier breeders. These breeders produce approximately 140 eggs that are incubated for 3 weeks. Once hatched, the chicks are placed on the farms of chicken producers for approximately 6 weeks before processing.

Source : National Farm Products Council

Chicken Farm Cash Receipts (FCR) - 2002

	FCR ($000)	Share of Chicken Market %	Chicken FCR vs Total FCR %
B.C.	231,141	15.9	10.5
Alta.	122,799	8.5	1.5
Sask.	46,852	3.2	0.7
Man.	61,189	4.2	1.6
Ont.	471,795	32.5	5.6
Que.	404,422	27.9	7.4
N.B.	37,094	2.6	8.7
N.S.	50,932	3.5	12.5
P.E.I.	x	x	x
Nfld.	x	x	x
Canada	1,451,691	100.0	4.1
West	461,981	31.8	2.3
Central	876,217	60.4	6.3
East	113,493	7.8	8.8

Source : Statistics Canada

x - confidential

Chicken Exports

	2002		1998	
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)
United States	92.7	20.8	19.3	5.3
China	12.0	14.0	12.6	11.6
Russia	9.0	12.0	1.9	1.6
South Africa	7.5	9.0	1.9	1.6
Cuba	7.2	7.3	29.5	26.4
Hong Kong	2.8	3.5	10.4	9.3
Others	20.4	25.4	5.6	6.4
Total	151.6	92.0	81.2	62.2

Source : Statistics Canada

Over the last five years, the U.S. has become Canada's dominant market for chicken exports, accounting for over 60% of exports by value in 2002. In contrast, the U.S. accounts for only 23% of the total volume. This is because most exports (58%) to the U.S. are prepared foods such as cooked, seasoned chicken wings, breast filets and dinners.

Exports to China have remained constant over the period, in both value and quantity. Russia has become our third-largest market, replacing Cuba. Our largest market five years ago, Cuba's purchases of chicken have fallen by 75%. Meat imported for re-export is included in the above figures.

Volume of Chicken Imports

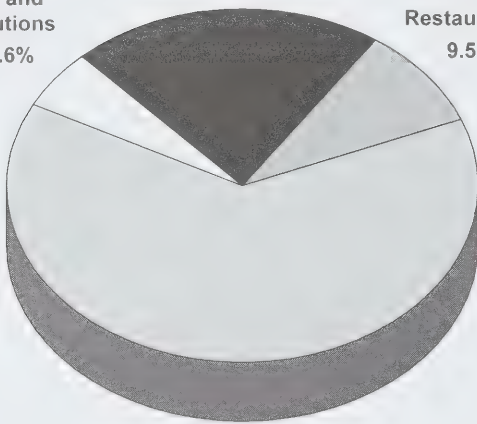
	2002 (000 000 kg)	%	1998 (000 000 kg)	%
Live	-	-	1.1	2.1
Whole Bird	0.5	0.6	0.4	0.8
Breasts	33.2	41.4	21.8	41.9
Legs	6.5	8.1	4.4	8.5
Wings	17.9	22.3	16.8	32.3
Others	22.1	27.6	7.5	14.4
Total	80.2	100.0	52.0	100.0

Source : Agriculture and Agri-Food Canada, actual weight.

The importation of chicken is based on a Tariff Rate Quota (TRQ) system with a NAFTA access level of 7.5% of the previous year's production. Supplementary permits may be issued over and above the TRQ access level. Virtually all of this additional product is for re-export.

Meat imported for re-export made up almost 30% of total imports in 2002. Prior to 2002, virtually all chicken meat imports originated in the U.S.. In 2002, for the first time, a small quantity was imported from Thailand. Total imports were valued at $353 million in 2002.

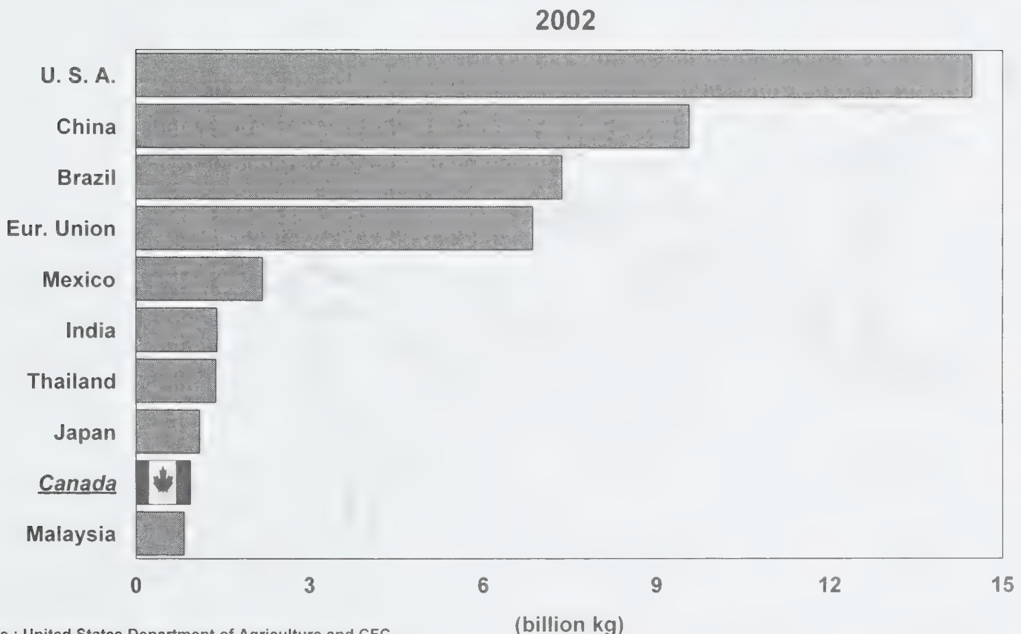
Chicken Consumption by Market Sector



	2002	2001	2000	1999	1998
	(000 000 kg)				
Retail	615	597	550	524	498
Fast Food	207	203	197	191	178
Full Service Restaurants	92	92	92	85	71
Hotel and Instutions	54	51	52	50	46
Total	968	943	891	850	793

Source : Further Poultry Processors Association of Canada

Largest Chicken Meat Producing Countries



Source : United States Department of Agriculture and CFC

Notes

TURKEY

Turkey Highlights

Canadian Turkey Marketing Agency (CTMA) established in 1974

	2002	2001	2000	1999	1998
Number of Producers	556	542	545	551	558
Farm Cash Receipts ($000 000)	257.0	261.8	263.3	240.3	248.5
Production (000 000 kg)	145.7	148.5	151.8	139.1	138.6
Per Capita Consumption (kg)	4.3	4.2	4.2	4.2	4.3
Consumer Price Index (1992=100)	131.4	128.4	123.9	118.5	111.1
Share of Meat Consumption (%)	4.4	4.3	4.3	4.3	4.5
Exports ($000 000)	17.1	18.2	13.2	10.1	10.4
Imports ($000 000)	26.5	23.8	18.7	21.1	14.9

Turkey Production

1992 - 2002

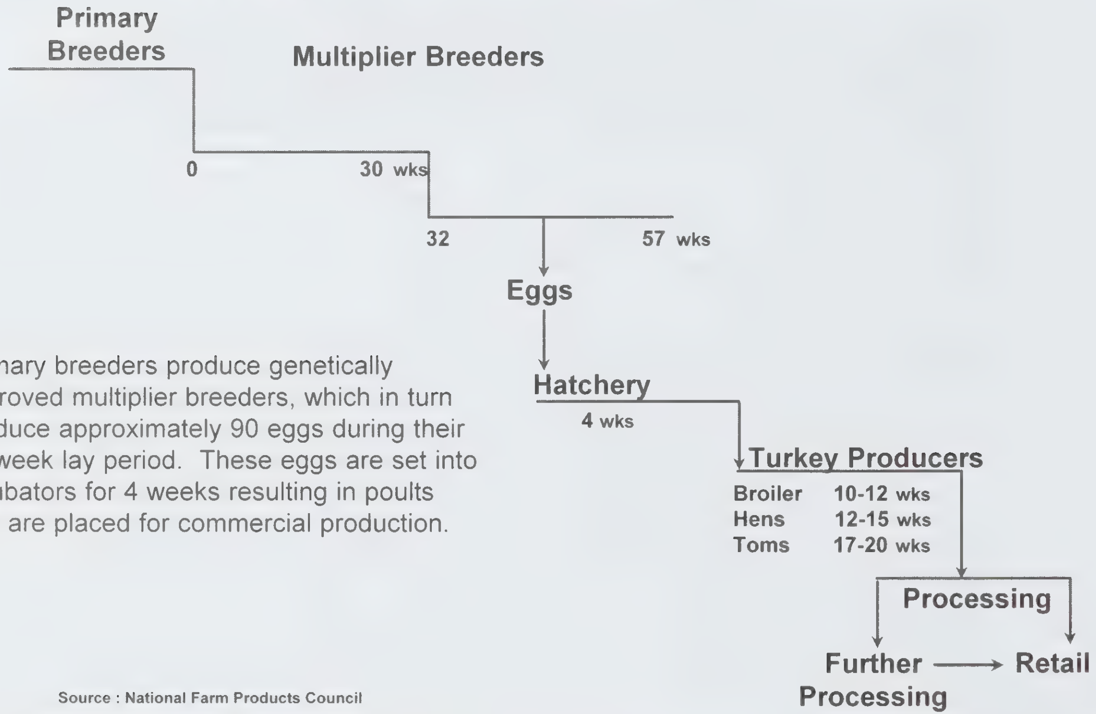
Source :Agriculture and Agri-Food Canada

Turkey Production - 2002

	Production (000 kg)	Market Share %
B.C.	15,403	10.6
Alta.	11,509	7.9
Sask.	4,664	3.2
Man.	9,714	6.7
Ont.	67,005	46.0
Que.	31,155	21.4
N.B.	2,544	1.7
N.S.	3,695	2.5
P.E.I.	-	-
Nfld.	-	-
Canada	145,689	100.0
West	41,290	28.3
Central	98,160	67.4
East	6,239	4.3

Source : Agriculture and Agri-Food Canada

Turkey Production Timeline



Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 90 eggs during their 25 week lay period. These eggs are set into incubators for 4 weeks resulting in poults that are placed for commercial production.

Source : National Farm Products Council

Turkey Farm Cash Receipts (FCR) - 2002

	FCR ($000)	Share of Turkey Market %	Turkey FCR vs Total FCR %
B.C.	26,529	10.3	1.2
Alta.	21,069	8.2	0.3
Sask.	8,901	3.5	0.1
Man.	17,042	6.6	0.5
Ont.	116,634	45.4	1.4
Que.	56,126	21.8	1.0
N.B.	4,398	1.7	1.0
N.S.	6,204	2.4	1.5
P.E.I.	x	x	x
Nfld.	x	x	x
Canada	256,972	100.0	0.7
West	73,541	28.6	0.4
Central	172,760	67.2	1.2
East	10,671	4.2	0.8

Source : Statistics Canada

x - confidential

Turkey Exports

	2002		1998	
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)
Russia	6.4	7.1	1.1	1.0
United States	4.4	0.9	1.6	0.6
South Africa	0.9	1.4	1.2	0.9
Philippines	0.5	0.8	0.7	1.1
Cuba	0.5	0.4	1.0	0.8
China	0.1	0.2	0.9	1.1
Others	4.3	5.0	3.9	4.4
Total	17.1	15.8	10.4	9.9

Source : Statistics Canada

The value and volume of turkey exports have increased by roughly 60% since 1998. Both Russia and the U.S. have shown substantial increases. In 2002, Russia became the leading destination, accounting for 37% of our exports by value, and 45% by volume.

Russia purchases almost entirely frozen cuts (97%). After ranking first in 2001, exports to the U.S. fell by 25% in 2002. The U.S. continues to be our best market for high value prepared foods such as dinners and deli meats, which made up 60% of their total purchases.

Volume of Turkey Imports

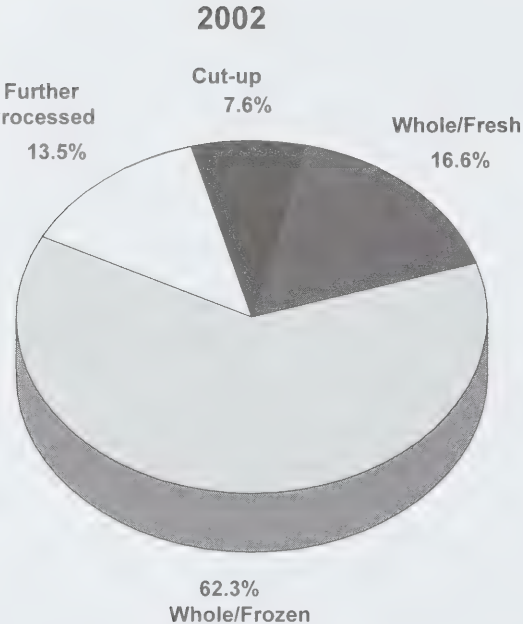
	2002 (000 000 kg)	%	1998 (000 000 kg)	%
Live	-	-	0.3	7.0
Boneless- Breasts	1.9	51.4	1.5	34.9
Boneless - Other	1.2	32.4	0.8	18.6
Boneless - Cooked	0.3	8.1	0.2	4.7
Bone-In Parts	0.2	5.4	0.8	18.6
Others	0.1	2.7	0.7	16.3
Total	3.7	100.0	4.3	100.0

Source : Agriculture and Agri-Food Canada, actual weight.

The importation of turkey is based on a Tariff Rate Quota (TRQ) system with a WTO access level of 5.6 million kg eviscerated weight basis. Supplementary permits may be issued over and above the TRQ access level.

Virtually all of this additional product is for re-export. Meat imported for re-export made up almost one quarter of total imports in 2002. To date, all turkey meat imports have originated in the U.S. These imports were valued at $26 million in 2002.

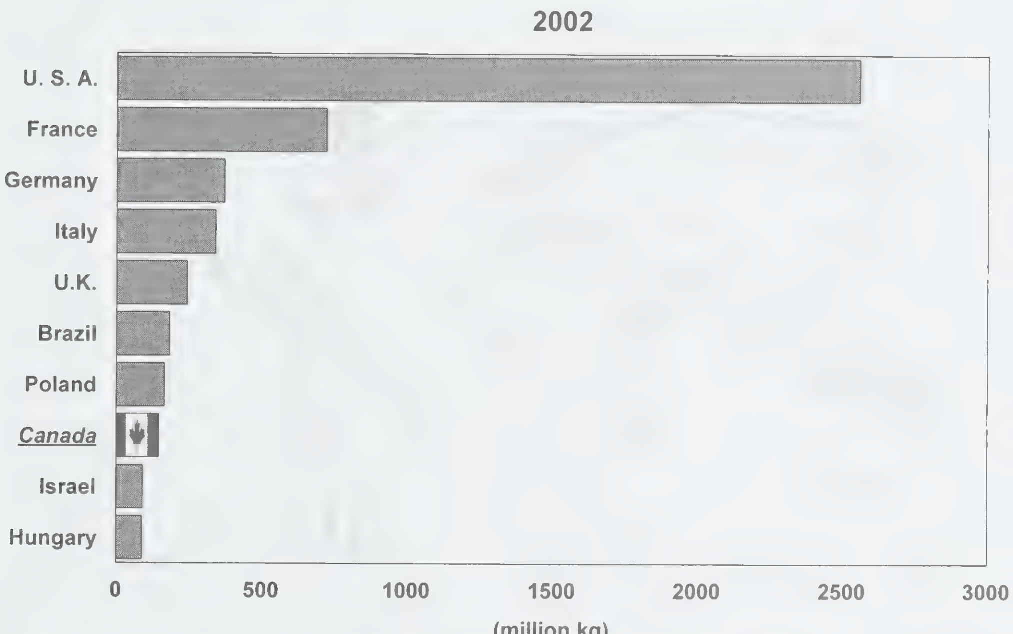
Retail Purchases of Turkey



	2002	2001	2000	1999	1998
			(000 000 kg)		
Whole/Frozen	49	49	41	39	43
Whole/Fresh	13	13	14	12	11
Cut-up	6	8	7	6	6
Further Processed	11	11	10	9	9
Total	79	80	71	67	69

Source : CTMA

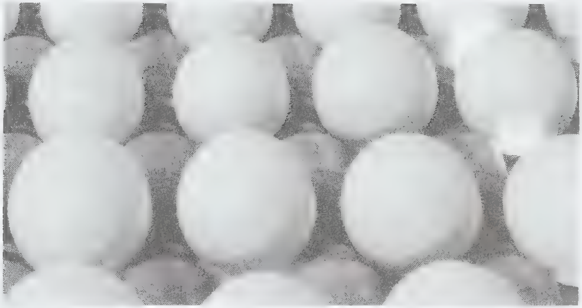
Largest Turkey Meat Producing Countries



Source : United States Department of Agriculture, Food and Agriculture Organization and Agriculture and Agri-Food Canada

Notes

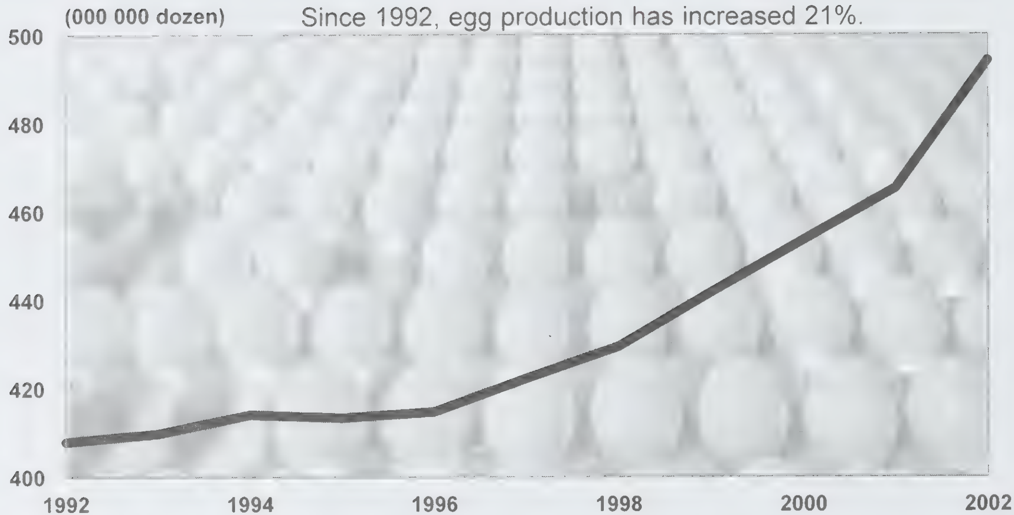
EGGS



Egg Highlights Canadian Egg Marketing Agency (CEMA) established in 1972	2002	2001	2000	1999	1998
Number of Producers	1,128	1,146	1,147	1,177	1,216
Farm Cash Receipts ($000 000)	584.1	565.4	513.6	484.1	473.2
Production (000 000 dozen)	494.2	467.7	454.9	441.7	429.5
Per Capita Consumption (dozen)	15.4	15.8	15.7	15.2	15.1
Consumer Price Index (1992=100)	133.9	129.3	124.0	122.3	123.2
Exports ($000 000)	41.7	30.7	26.1	25.3	21.4
Imports ($000 000)	31.5	30.7	29.9	34.2	36.6

Egg Production

1992 - 2002



Source : 1992-1993 : Agriculture and Agri-Food Canada
1994-2002 : CEMA

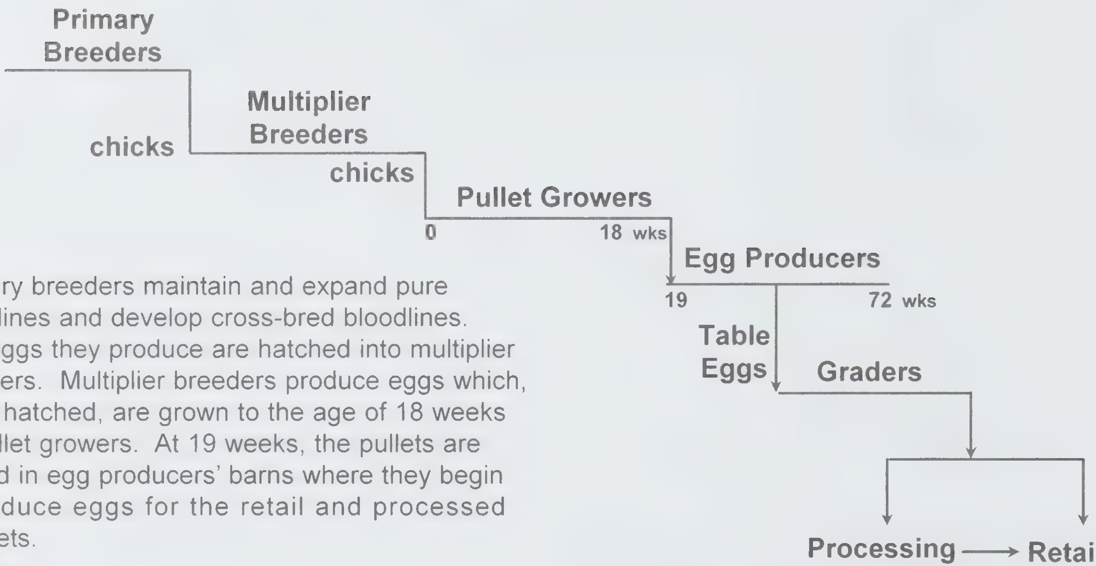
Egg Production - 2002

	Production (000 dozen)	Market Share %
B.C.	59,421	12.0
Alta.	39,413	8.0
N.W.T.	2,447	0.5
Sask.	19,873	4.0
Man.	54,777	11.1
Ont.	185,624	37.6
Que.	93,562	18.9
N.B.	10,501	2.1
N.S.	17,924	3.6
P.E.I.	3,031	0.6
Nfld.	7,580	1.5
Canada	494,153	100.0

West	175,931	35.6
Central	279,186	56.5
East	39,036	7.9

Source : CEMA

Egg Production Timeline



Primary breeders maintain and expand pure bloodlines and develop cross-bred bloodlines. The eggs they produce are hatched into multiplier breeders. Multiplier breeders produce eggs which, when hatched, are grown to the age of 18 weeks by pullet growers. At 19 weeks, the pullets are placed in egg producers' barns where they begin to produce eggs for the retail and processed markets.

Source : National Farm Products Council

Egg Farm Cash Receipts (FCR) - 2002

	FCR ($000)	Share of Egg Market %	Egg FCR vs Total FCR %
B.C.	75,153	12.9	3.4
Alta.	42,376	7.3	0.5
Sask.	23,241	4.0	0.4
Man.	64,855	11.1	1.7
Ont.	223,198	38.2	2.6
Que.	102,756	17.6	1.9
N.B.	14,511	2.5	3.4
N.S.	23,432	4.0	5.7
P.E.I.	3,509	0.6	0.9
Nfld.	11,058	1.9	13.4
Canada	584,089	100.0	1.6
West	205,625	35.2	1.0
Central	325,954	55.8	2.3
East	52,510	9.0	4.1

Source : Statistics Canada

Note : Statistics Canada does not publish FCR for N.W.T.

Value of Egg Product Exports

	2002 ($000 000)	%	1998 ($000 000)	%
United States	19.7	47.2	4.8	22.4
Japan	16.2	38.8	13.5	63.1
Venezuela	1.3	3.1	0.2	0.9
Others	4.5	10.8	2.9	13.6
Total	41.7	100.0	21.4	100.0

Source : Statistics Canada

The U.S. is now Canada's major market for egg product exports, accounting for almost half by value. Traditionally, Japan has been the leading importer of Canadian processed egg products. In 2001 the value of exports into Japan equalled 52% of the total value of Canada's egg product exports while the value of exports into the United States was 25%.

The export data in the above table includes eggs and egg products imported for re-export. Canada exports virtually no shell eggs.

Value of Egg Product Exports - by Category

	2002 ($000 000)	%	1998 ($000 000)	%
Whole Egg - Liquid/Frozen	1.5	3.7	1.5	7.0
Whole Egg - Dried	9.3	22.3	1.6	7.7
Egg Albumen - Liquid/Frozen	2.1	5.0	0.8	3.8
Egg Albumen - Dried	12.4	29.7	10.8	50.7
Egg Yolks - Liquid/Frozen	6.6	15.8	1.4	6.8
Egg Yolks - Dried	8.5	20.4	4.7	22.2
Other	1.3	3.1	0.4	1.9
Total	41.7	100.0	21.4	100.0

Note : Exports of shell eggs are minimal

Source : Statistics Canada

The value of egg exports has increased by 95% since 1998. Dried egg albumen represents the largest share of export value.

However, the increase in dried egg albumen over the last five years was outpaced by the growth in dried whole eggs and liquid/frozen egg yolks.

Value of Egg Imports

	2002 ($000 000)	%	1998 ($000 000)	%
Whole Egg - Liquid/Frozen	4.2	13.3	2.5	6.8
Whole Egg - Dried	1.6	5.1	3.0	8.2
Egg Albumen - Liquid/Frozen	2.2	7.0	3.7	10.1
Egg Albumen - Dried	1.2	3.8	1.6	4.4
Egg Yolks - Liquid/Frozen	2.3	7.3	4.4	12.0
Egg Yolks - Dried	1.2	3.8	0.5	1.4
Egg Preparation	3.4	10.8	1.6	4.4
Shell Eggs	15.4	48.9	19.4	52.9
Total	31.5	100.0	36.7	100.0

Source : Statistics Canada

The import access level under Canada's WTO commitment is 21,370,000 dozen (egg equivalent).

In 2002, 19.6 million dozen shell eggs and 9.4 million kg of egg products were imported. With respect to egg product imports, 52% were imported for re-export.

CEMA's Industrial Product Volumes

(000 dozen)

	2002	1998
B.C.	13,250	7,949
Alta.	5,791	4,114
N.W.T.	2,239	- *
Sask.	3,381	3,120
Man.	26,028	24,163
Ont.	33,679	32,064
Que.	14,825	4,478
N.B.	2,867	1,607
N.S.	6,328	4,720
P.E.I.	1,354	787
Nfld.	2,859	1,946
Canada	112,601	84,948

Source : CEMA

* N.W.T. was not part of the national system in 1998.

Industrial product refers to eggs that are in excess of local or provincial requirements for the table market. These eggs are sold by CEMA to egg processors for the production of dried, liquid and cooked eggs. Since 1998, the quantity of eggs declared as industrial product has increased 33%, mainly due to increased demand for processed egg products.

Processed Egg Production

(000 kg liquid equivalent)

	2002	1998	% Change
Whole Egg	38,072	29,484	29.1
Yolk	15,637	8,022	94.9
Albumen	29,271	14,766	98.2
Total	82,980	52,272	58.7

Source : Agriculture and Agri-Food Canada

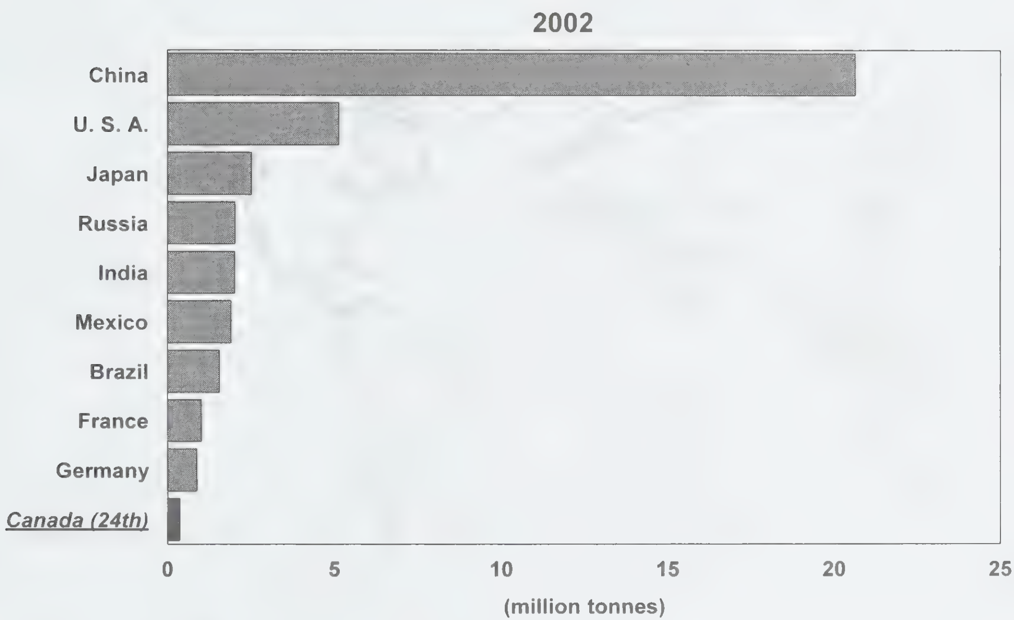
Eggs Broken for Processing

(000 Dozen)

	2002	1998	% Change
Eggs Broken	160,150	95,798	67.2

Source : Agriculture and Agri-Food Canada

Largest Egg Producing Countries



Source : Food and Agriculture Organization of the United Nations

Industry Contacts

Chicken Farmers of Canada
350 Sparks St , Suite 1007
Ottawa, Ontario
K1R 7S8
Phone: (613) 241-2800
Fax: (613) 241-5999
Website: www.chicken.ca
Contact: Mr. Mike Dungate, General Manager

Canadian Turkey Marketing Agency
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Mississauga, Ontario
L5N 6J7
Phone: (905) 812-3140
Fax: (905) 812-9326
Website: www.canadianturkey.ca
Contact: Mr. Phil Boyd, Executive Director

Canadian Egg Marketing Agency
1501 - 112 Kent Street
Ottawa, Ontario
K1P 5P2
Phone: (613) 238-2514
Fax: (613) 238-1967
Website: www.canadaegg.ca
Contact: Mr. Tim Lambert, Executive Director

Canadian Poultry and Egg Processors Council
1545 Carling Avenue, Suite 400
Ottawa, Ontario
K1Z 8P9
Phone: (613) 724-6605
Fax: (613) 724-4577
Website: www.cpepc.ca
Contact: Mr. Robin Horel, President and CEO

Canadian Broiler Hatching Egg Marketing Agency
75 Albert Street, Suite 1101
Ottawa, Ontario
K1P 5E7
Phone: (613) 232-3023
Fax: (613) 232-5241
Website: www.cbhema.com
Contact: Mr. Errol Halkai, General Manager

Further Poultry Processors Association of Canada
2525 St. Laurent Blvd., Suite 203
Ottawa, Ontario
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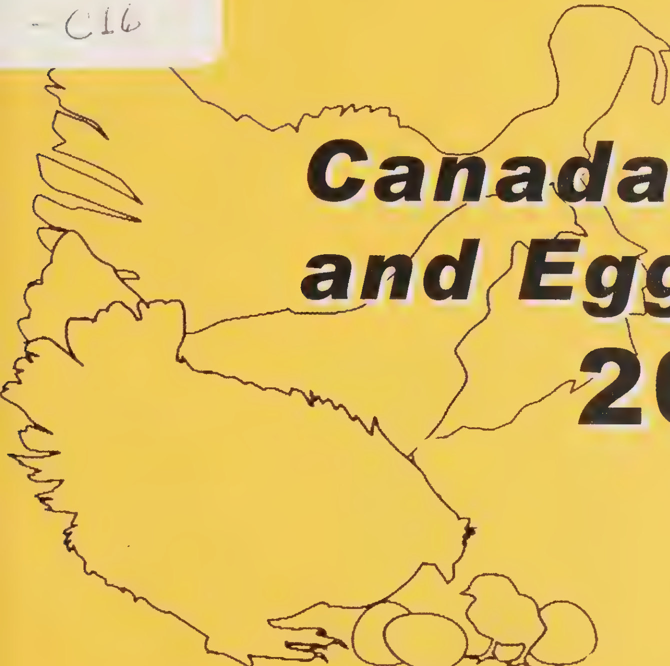
Fax: (613) 733-9501
Website: www.sympatico.ca/fppac
Contact: Mr. Robert DeValk, General Manager

Notes

NFPC CNPA

National Farm Products Council

Conseil national des produits agricoles



Canada's Poultry and Egg Industry 2004

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Introduction

Welcome to the third edition of *Canada's Poultry and Egg Industry* handbook. This reference guide uses data obtained from industry and government, and tells a tale of success in meeting Canadians' needs for high-quality, reasonably priced poultry meat and eggs.

This success can be measured in the millions of kilograms of poultry and millions of eggs produced and consumed and in the value of farm cash receipts, which in 2003 was $2.6 billion. The industry creates opportunities for Canadians in every region.

The poultry and egg industry operates within an orderly marketing framework, also called supply management. There are four national marketing agencies - the Canadian Egg Marketing Agency (CEMA), established in 1972, the Canadian Turkey Marketing Agency (CTMA), established in 1974, the Chicken Farmers of Canada (CFC), established in 1978 and the Canadian Broiler Hatching Egg Marketing Agency (CBHEMA), established in 1986.

The National Farm Products Council (NFPC) oversees the four marketing agencies to ensure that they operate in the balanced interest of producers and consumers. The NFPC reviews agency orders and regulations, hears complaints about agency decisions, and provides advice about the agencies to the Minister of Agriculture and Agri-Food Canada.

At the provincial/territorial level, commodity marketing boards which represent producers are supervised by their governments.

Please feel free to contact us should you require additional copies of this handbook or have any questions. The Government of Canada, through the NFPC, is a strong supporter of our poultry and egg producers and processors.

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Poultry and Egg Producers

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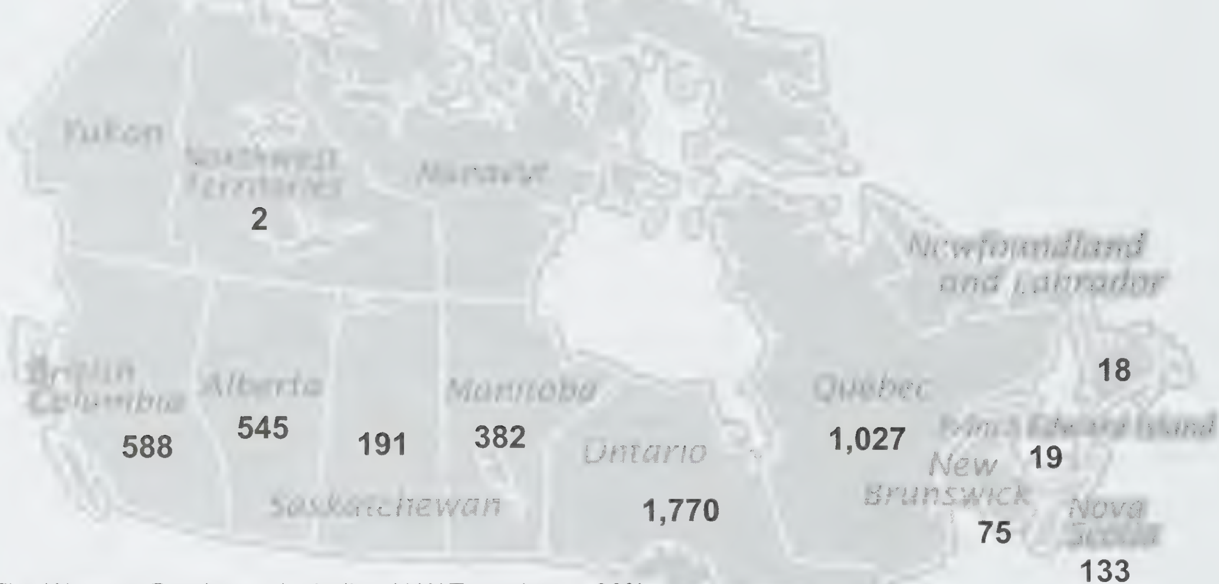


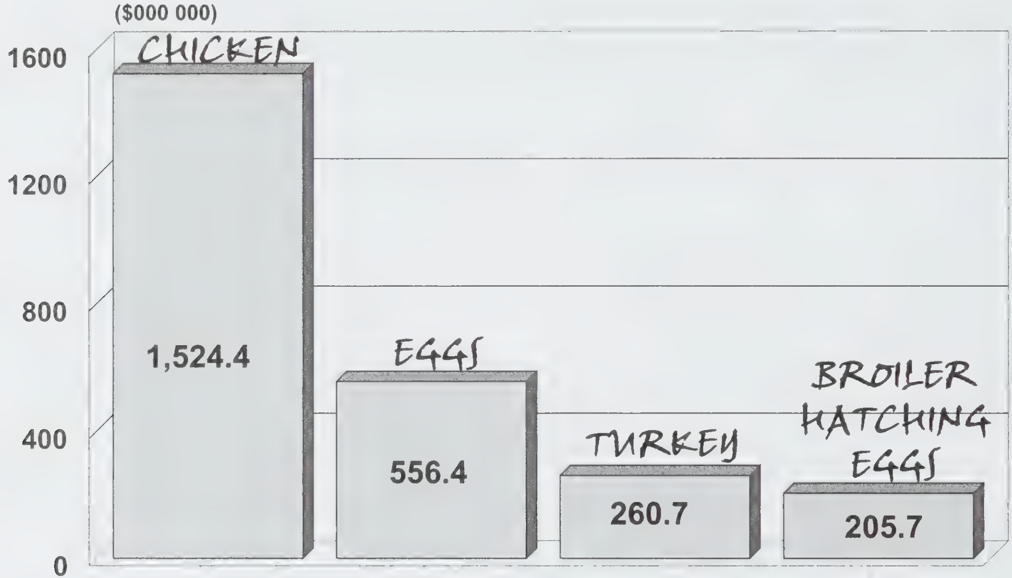
The Western Provinces, including N.W.T., make up 36% of Canada's total poultry and egg producers while 59% are in Central Canada and the remaining 5% are in the Atlantic Region.

Number of Poultry and Egg Producers - 2003

	Chicken	Turkey	Eggs	Broiler Hatching Eggs	Total
B.C.	345	49	132	62	588
Alta.	280	58	168	39	545
N.W.T.	-	-	2	-	2
Sask.	97	17	66	11	191
Man.	119	66	167	30	382
Ont.	1,109	181	394	86	1,770
Que.	723	138	107	59	1,027
N.B.	36	18	18	3	75
N.S.	85	23	24	1	133
P.E.I.	7	-	12	-	19
Nfld.	7	-	11	-	18
Canada	2,808	550	1,101	291	4,750

Source: CFC, CTMA, CEMA, CBHEMA

Farm Cash Receipts
2003



Poultry and eggs made up $2.6 billion of Canada's total farm cash receipts of $34.1 billion.

Source: Statistics Canada, CBHEMA

Farm Cash Receipts (FCR) - 2003

($000 000)

	Chicken	Turkey	Eggs	Broiler Hatching Eggs	Total	Poultry and Egg vs Total Provincial FCR (%)
B.C.	246.0	27.0	71.8	34.2	379.0	16.4
Alta.	123.5	23.2	42.0	22.3	211.0	3.0
Sask.	50.5	9.2	21.4	7.6	88.7	1.6
Man.	63.3	18.1	63.0	8.7	153.1	4.3
Ont.	496.9	117.8	200.2	62.3	877.3	10.5
Que.	421.4	54.9	100.8	54.1	631.1	10.6
N.B.	43.5	4.2	16.0	16.5 *	x	N/A
N.S.	53.3	6.1	25.4	*	x	N/A
P.E.I.	x	x	4.1	x	x	N/A
Nfld.	x	x	11.6	x	x	N/A
Canada	1,524.4	260.7	556.4	205.7	2,547.1	7.5

* N.B. and N.S. combined due to confidentiality

Note : Statistics Canada does not publish FCR for the N.W.T.

x - confidential

Source : Statistics Canada except for Hatching Eggs where FCR are calculated by CBHEMA.

In 2003, poultry and egg receipts made up 7.5% of total agricultural receipts. The three largest provinces, Ontario, Quebec and British Columbia, accounted for almost three quarters of poultry and egg receipts. Chicken receipts made up close to 60% of the total. Feed purchases by the poultry and egg industry were valued in excess of $1 billion.

Production by Province and Territory - 2003

	Chicken (000 kg)	Turkey (000 kg)	Eggs (000 dozen)	Broiler Hatching Eggs (000 eggs)
B.C.	147,801	15,711	60,706	110,705
Alta.	81,024	12,903	39,356	73,511
N.W.T.	-	-	2,041	-
Sask.	30,456	4,991	19,524	25,129
Man.	38,671	10,374	54,316	28,921
Ont.	303,134	67,235	187,152	208,170
Que.	260,810	30,962	95,360	184,760
N.B.	25,220	2,457	10,779	55,024 *
N.S.	31,372	3,492	17,591	*
P.E.I.	3,343	-	3,148	-
Nfld.	12,573	-	8,493	-
Canada	934,404	148,125	498,466	686,220

* For Broiler Hatching Eggs, production for N.B. and N.S. is shown under N.B.

Source : CFC, CTMA, CEMA, CBHEMA

Hatcheries, Processing Plants and Grading Stations

	Poultry		Eggs		
	Hatcheries	Primary Processing *	Egg Stock Hatcheries	Grading Stations	Egg Processing
B.C.	6	12	2	35	1
Alta.	9	9	8	53	2
N.W.T./Yukon	0	0	0	2	0
Sask.	4	2	2	27	0
Man.	10	5	2	36	2
Ont.	27	67	9	94	9
Que.	16	17	6	42	4
N.B.	2	3	3	18	0
N.S.	3	6	2	15	0
P.E.I.	0	1	0	7	0
Nfld.	1	7	0	6	0
Canada	78	129	34	335	18

* Primary Processing includes federally and provincially registered establishments but excludes Hutterite colonies.

Source: Agriculture and Agri-Food Canada, National Farm Products Council

Hatcheries incubate fertilized chicken and turkey eggs to produce chicks and poults. The day-old birds are then raised by producers into either meat-producing or egg-laying birds. Primary processing plants slaughter birds and prepare the meat for the retail market. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat. Egg grading stations prepare eggs for the table market. Egg processing plants (or "breakers") process eggs into liquid and dried form, as well as for pharmaceutical and industrial uses.

Value of Exports and Imports

($000 000)

	Chicken		Turkey		Eggs and Egg Products		Hatching Eggs & Broiler Chicks	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
2003	143.3	335.8	16.8	23.3	42.9	34.5	*	25.0
2002	151.6	353.4	17.1	26.5	41.7	31.6	*	35.2
2001	131.7	341.4	18.2	23.8	30.7	30.8	*	36.3
2000	87.6	294.3	13.2	18.7	26.2	26.9	*	28.9
1999	68.9	272.0	10.1	21.1	25.3	30.6	*	33.1

* Exports for broiler hatching eggs are minimal.

Source: Statistics Canada

There is an import for re-export program for poultry meat and eggs, under which these products can be imported into Canada for processing into value-added products. These products must subsequently be re-exported. The above exports include meat and egg products of both domestic and foreign origin.

Exports

Poultry and egg exports were valued at $203 million in 2003, almost double what they were five years ago. Chicken made up 71% of our total exports, eggs 21%, and turkey 8%. Most egg exports are not "in the shell", but consist of liquid and dried products.

The US continues to be our largest market for poultry and egg products. In the last five years, the US has risen from 35% of our poultry and egg export market to 60%. In 2003, Japan was our second largest market, at 11%. Japan has traditionally been our most important market for egg products. Markets that have become more important in recent years include South Africa, Russia and the Philippines. Those which have become less important include Cuba, China and Hong Kong.

Imports

Imports of poultry and eggs were valued at $418.6 million in 2003, up 17% from five years ago. Chicken made up 80% of the total, while eggs and egg products accounted for 8%, hatching eggs 6% and turkey 6%. The US was the source for 96.5% of the total. Brazil and Thailand each accounted for 1.5%. Imports from the US were predominantly fresh chicken parts (breasts and wings) and further processed meat products such as chicken burgers, cooked seasoned breasts, sausages and cold cuts.

Import permits for poultry and eggs are administered by International Trade Canada (ITCan) under a Tariff Rate Quota (TRQ) system. For each commodity, a level of within-quota access is established according to commitments made under multi-lateral and bi-lateral trade agreements. This product may enter at a zero or minimal tariff rate, depending on the agreement.

Per Capita Protein Consumption

	Beef (kg)	Chicken (kg)	Pork (kg)	Turkey (kg)	Table Eggs & Egg Products (dozen)
2003	32.0	30.5	25.2	4.2	15.6
2002	30.5	30.7	27.8	4.3	15.4
2001	30.7	30.5	28.9	4.2	15.9
2000	32.0	29.1	28.7	4.3	15.7
1999	32.6	27.8	30.1	4.2	15.3

Source : Statistics Canada

Chicken consumption decreased slightly in 2003, but remained 17% above the 1999 level. In 2002, chicken consumption exceeded beef consumption for the first time. This was reversed in 2003. With the elimination of beef exports as a result of BSE, more beef remained on the domestic market. According to Statistics Canada, even with the discovery of a single case of BSE and the resulting border closures, lower prices and Canadian's support for the beef industry, domestic consumption increased by 5%. Pork consumption has fallen 16% in the last five years, falling 5% in the last year alone. Turkey consumption has remained unchanged. Egg consumption increased slightly in 2003, but has been relatively stable in recent years.

Consumer Price Index (1992=100)

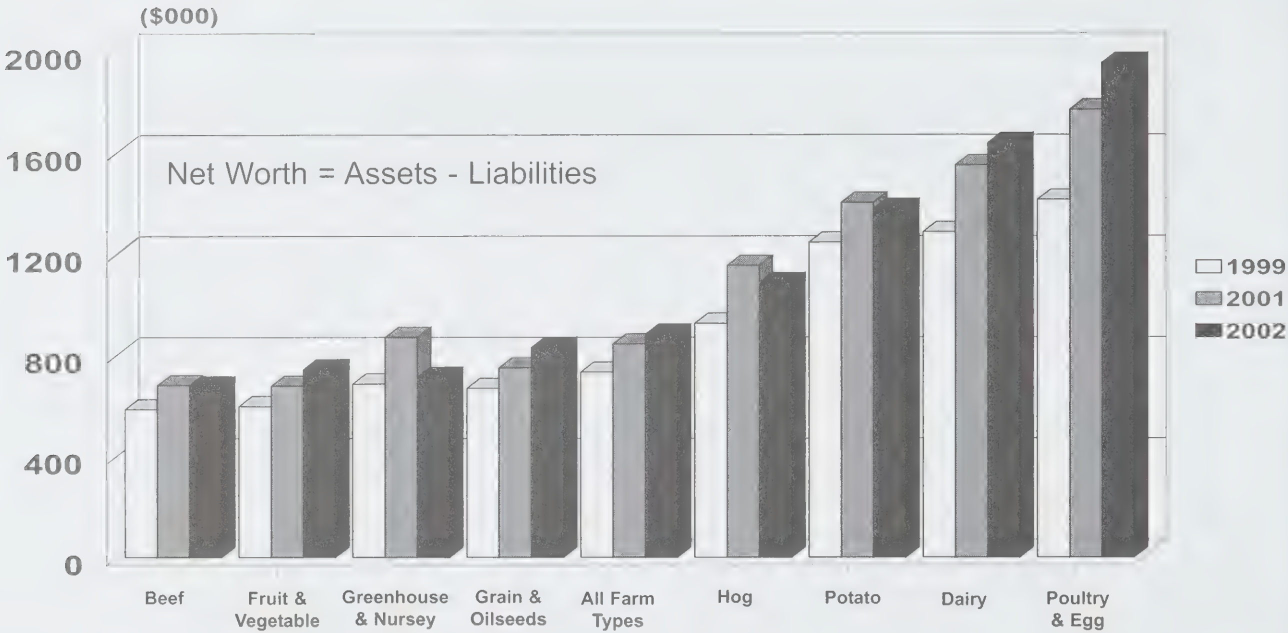
	Chicken	Turkey	Eggs	Beef	Pork	All Foods
2003	123.6	131.7	140.4	133.8	118.9	122.4
2002	116.7	131.4	133.9	132.8	118.8	120.3
2001	116.2	128.4	129.3	128.2	122.4	117.2
2000	110.6	123.9	124.0	111.3	112.1	112.2
1999	110.4	118.5	122.3	104.4	105.4	110.7

Source : Statistics Canada

The Consumer Price Index (CPI) compares, in percentage terms, current prices to prices in the official base period of 1992=100.

For example, the price of all foods in 2003 was 22.4% higher than it was in 1992.

Average Net Worth per Farm, by Farm Type



Source : Agriculture and Agri-Food Canada's Farm Financial Survey, 2003

Poultry and egg farms had the highest net worth in 2002 at almost two million dollars. Dairy farms and potato farms followed with net worths of 1.6 and 1.4 million dollars respectively.

The net worth of poultry and egg farms has increased by 38% since 1999. Beef farms, with a net worth of just under 0.7 million dollars, have increased their net worth by 16% since 1999.

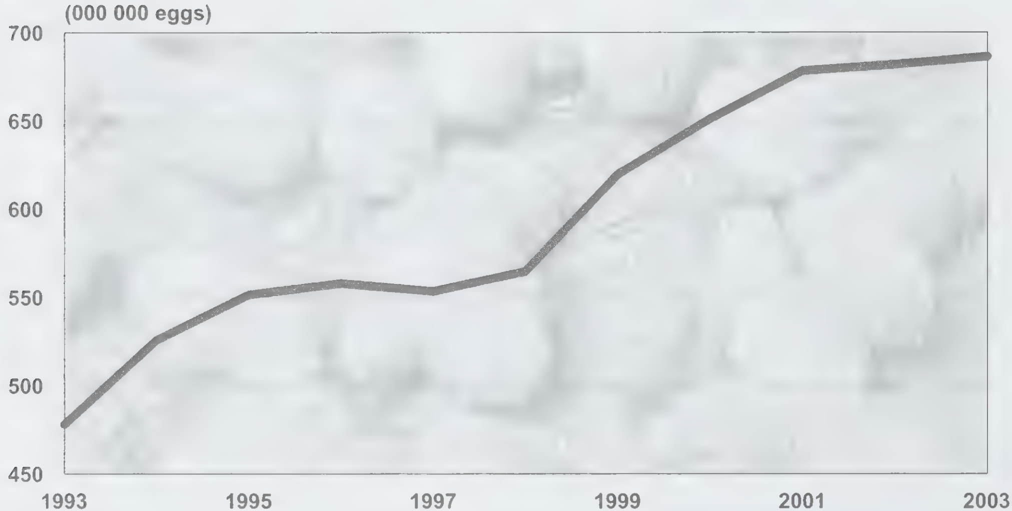
BROILER HATCHING EGGS

Broiler Hatching Egg Highlights

	2003	2002	2001	2000	1999
Number of Producers	291	299	300	300	299
Farm Cash Receipts ($000 000)	205.7	206.5	205.2	195.4	183.5
Production (000 000 eggs)	686.2	681.7	678.4	651.1	619.6
Imports - Hatching Eggs ($000 000)	19.6	27.4	28.3	23.4	26.2
Imports - Broiler Chicks ($000 000)	5.4	7.8	8.0	5.5	6.9

Broiler Hatching Egg Production

1993 - 2003



Since 1993, broiler hatching egg production has increased 44%.

Source : CBHEMA and Agriculture and Agri-Food Canada

Broiler Hatching Egg Production - 2003

	Production (000 eggs)	Market Share %
B.C.	110,705	16.1
Alta.	73,511	10.7
Sask.	25,129	3.7
Man.	28,921	4.2
Ont.	208,170	30.3
Que.	184,760	26.9
N.B. and N.S.*	55,024	8.0
Canada	686,220	100.0

West	238,266	34.7
Central	392,930	57.3
East	55,024	8.0

* combined due to confidentiality

Source : CBHEMA and Agriculture and Agri-Food Canada

Hatching Egg Farm Cash Receipts (FCR) - 2003

	FCR ($000)	Share of Broiler Hatching Egg Market %	Broiler Hatching Egg FCR vs Total FCR %
B.C.	34,191	16.6	1.5
Alta.	22,288	10.8	0.3
Sask.	7,619	3.7	0.1
Man.	8,692	4.2	0.2
Ont.	62,314	30.3	0.7
Que.	54,057	26.3	0.9
N.B. and N.S.*	16,471	8.0	2.0
Canada	205,632	100.0	0.6
West	72,790	35.4	0.4
Central	116,371	56.6	0.8
Atlantic	16,471	8.0	2.0

* combined due to confidentiality

Source : Estimated by CBHEMA

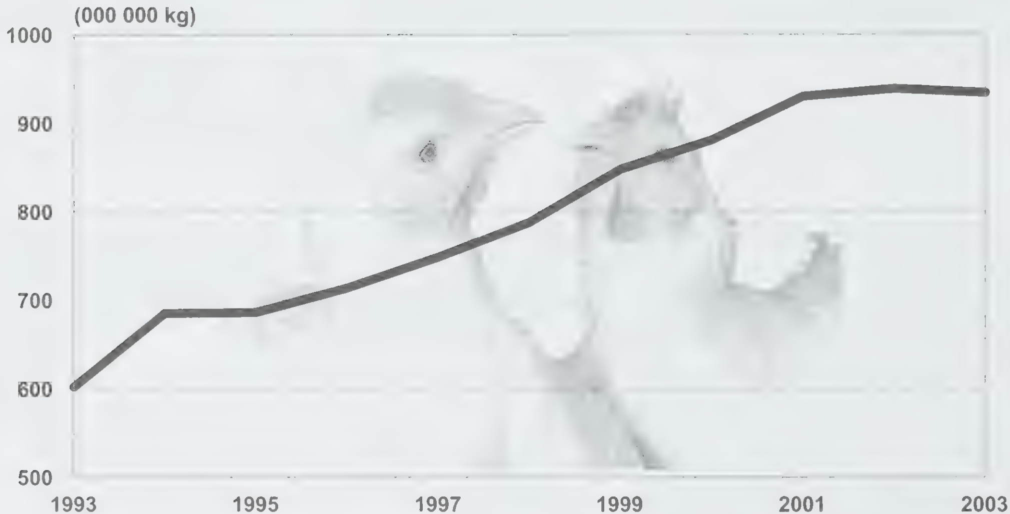
CHICKEN

Chicken Highlights

	2003	2002	2001	2000	1999
Number of Producers	2,808	2,851	2,815	2,817	2,859
Farm Cash Receipts ($000 000)	1,524.4	1,452.9	1,522.3	1,368.1	1,320.9
CFC Production (000 000 kg)	934.4	938.9	930.1	880.7	847.6
Per Capita Consumption (kg)	30.5	30.7	30.5	29.1	27.8
Consumer Price Index (1992=100)	123.6	116.7	116.2	110.6	110.4
Share of Meat Consumption (%)	31.8	31.6	31.0	29.6	28.1
Exports ($000 000)	143.4	151.6	131.7	87.6	68.8
Imports ($000 000)	335.8	353.4	341.4	294.3	272.0

Chicken Production

1993 - 2003



Since 1993, chicken production has increased 55%.

Source : 1993-1997 Agriculture and Agri-Food Canada
1998-2003 CFC

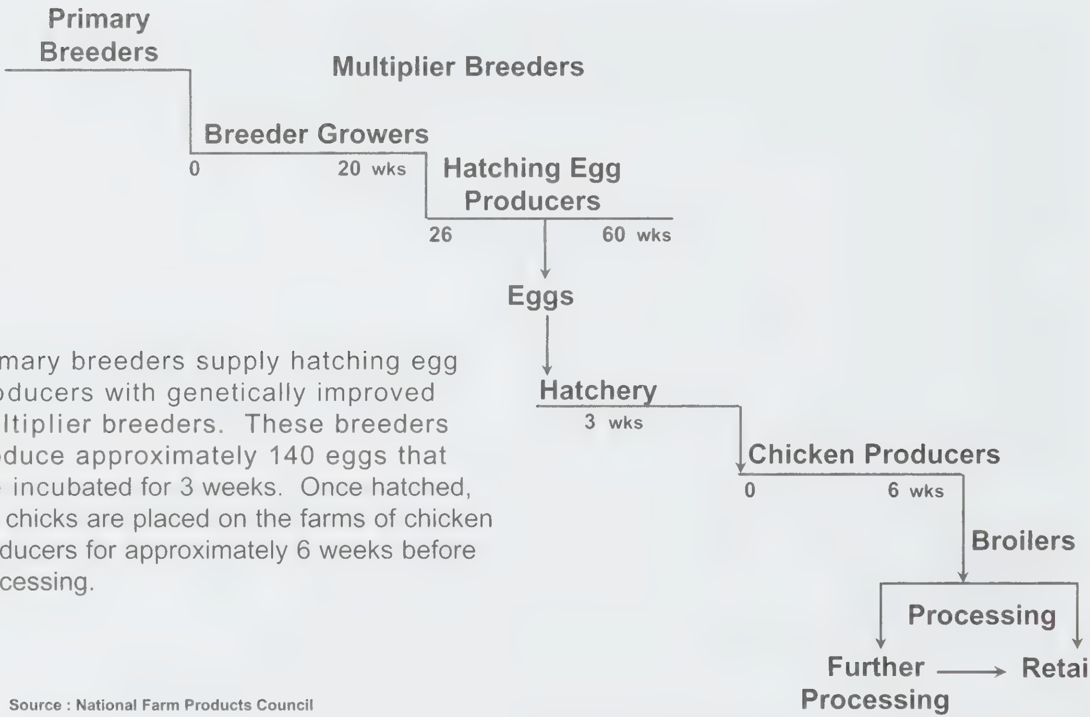
Chicken Production - 2003

	Production (000 kg)	Market Share %
B.C.	147,801	15.8
Alta.	81,024	8.7
Sask.	30,456	3.3
Man.	38,671	4.1
Ont.	303,134	32.4
Que.	260,810	27.9
N.B.	25,220	2.7
N.S.	31,372	3.4
P.E.I.	3,343	0.4
Nfld.	12,573	1.3
Canada	934,404	100.0

West	297,952	31.9
Central	563,944	60.4
East	72,508	7.8

Source : CFC

Chicken Production Timeline



Primary breeders supply hatching egg producers with genetically improved multiplier breeders. These breeders produce approximately 140 eggs that are incubated for 3 weeks. Once hatched, the chicks are placed on the farms of chicken producers for approximately 6 weeks before processing.

Source : National Farm Products Council

Chicken Farm Cash Receipts (FCR) - 2003

	FCR ($000)	Share of Chicken Market %	Chicken FCR vs Total FCR %
B.C.	245,962	16.1	10.6
Alta.	123,488	8.1	1.8
Sask.	50,454	3.3	0.9
Man.	63,345	4.2	1.8
Ont.	496,942	32.6	6.0
Que.	421,428	27.6	7.0
N.B.	43,518	2.9	11.0
N.S.	53,285	3.5	12.8
P.E.I. and Nfld. *	25,992	1.7	--
Canada	1,524,414	100.0	4.5
West	483,249	31.7	2.6
Central	918,370	60.2	6.4
East	122,795	8.1	9.8

* combined due to confidentiality

-- amount too small to be expressed

Source : Statistics Canada

Chicken Exports

	2003		1999	
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)
United States	101.3	22.0	29.9	9.2
South Africa	10.6	13.5	2.3	3.0
Philippines	5.7	7.6	1.0	1.2
Russia	5.7	8.6	0.8	1.4
China	4.6	5.7	9.2	11.6
Hong Kong	4.2	5.1	5.6	5.8
Others	11.3	16.5	20.0	23.0
Total	143.4	79.0	68.8	55.2

Source : Statistics Canada

The U.S. continues to be Canada's dominant market for chicken exports, accounting for over 70% of exports by value in 2003.

In contrast, the U.S. accounts for only 28% of the total volume. Almost half of the chicken exported to the U.S. was higher valued further processed products.

Volume of Chicken Imports

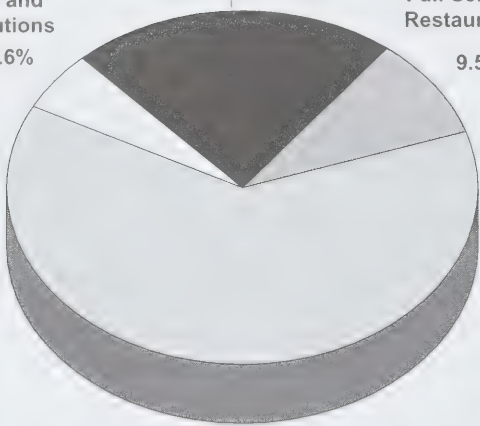
	2003 (000 000 kg)	%	1999 (000 000 kg)	%
Live	0.2	0.2	0.9	1.3
Whole Bird	0.5	0.5	0.2	0.3
Breasts	29.0	30.8	24.2	34.9
Legs	3.9	4.1	5.6	8.1
Wings	17.9	19.0	18.7	26.9
Others	28.6	30.4	8.9	12.8
Further Processed	14.0	14.9	10.9	15.7
Total	94.1	100.0	69.4	100.0

Source : Agriculture and Agri-Food Canada, actual weight.

The importation of chicken is based on a Tariff Rate Quota (TRQ) system with a NAFTA access level of 7.5% of the previous year's production. Special supplementary permits may be issued over and above the TRQ access level.

In 2003, chicken meat imported for re-export made up 26% of total imports. Prior to 2002, virtually all chicken meat imports originated in the U.S. Brazil emerged as an alternate source for Canadian importers in 2003, supplying over 3.2 million kg.

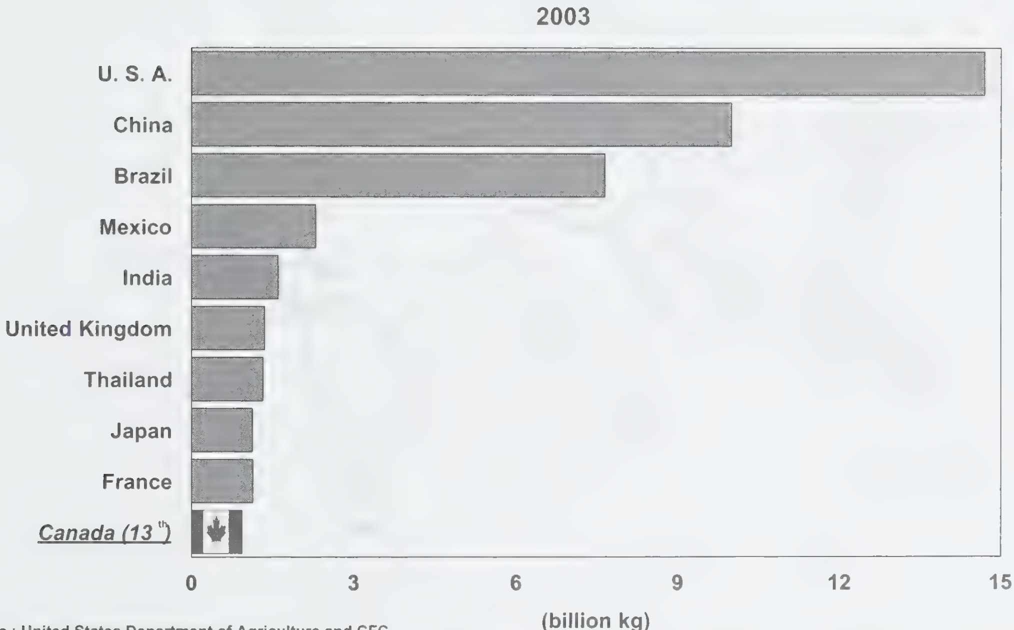
Chicken Consumption by Market Sector



	2003	2002	2001	2000	1999
			(000 000 kg)		
Retail	595	608	597	553	524
Fast Food	213	211	203	193	191
Full Service Restaurants	90	94	92	90	85
Hotel and Instutions	53	54	54	54	50
Total	951	967	946	890	850

Source : Further Poultry Processors Association of Canada

Largest Chicken Meat Producing Countries



Source : United States Department of Agriculture and CFC

Notes

TURKEY

Turkey Highlights

	2003	2002	2001	2000	1999
Number of Producers	550	556	542	545	551
Farm Cash Receipts ($000 000)	260.7	258.8	262.6	263.3	240.2
CTMA Production (000 000 kg)	148.1	145.7	148.5	151.8	139.1
Per Capita Consumption (kg)	4.2	4.3	4.2	4.3	4.2
Consumer Price Index (1992=100)	131.7	131.4	128.4	123.9	118.5
Share of Meat Consumption (%)	4.4	4.4	4.3	4.4	4.3
Exports ($000 000)	16.8	17.1	18.2	13.2	10.1
Imports ($000 000)	23.3	26.5	23.8	18.7	21.1

Turkey Production

1993 - 2003

Since 1993, turkey production has increased 16%.

Source : Agriculture and Agri-Food Canada

Turkey Production - 2003

	Production (000 kg)	Market Share %
B.C.	15,711	10.6
Alta.	12,903	8.7
Sask.	4,991	3.4
Man.	10,374	7.0
Ont.	67,235	45.4
Que.	30,962	20.9
N.B.	2,457	1.7
N.S.	3,492	2.4
P.E.I.	--	--
Nfld.	--	--
Canada	148,125	100.0

West	43,979	29.7
Central	98,197	66.3
East	5,949	4.0

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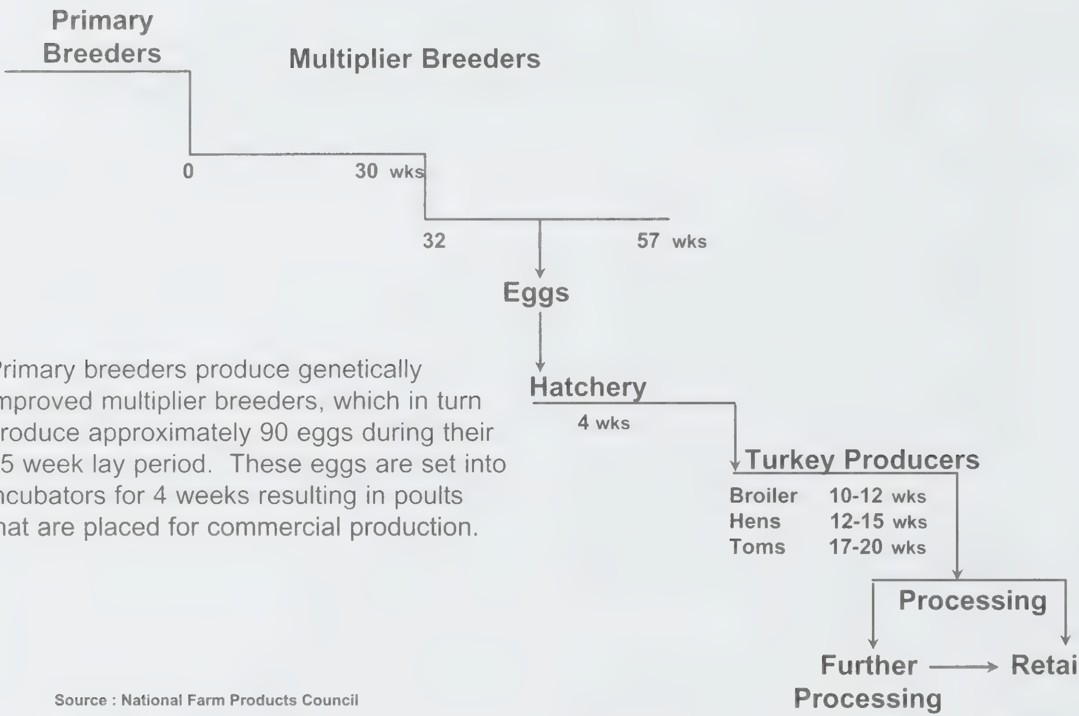
Source : Agriculture and Agri-Food Canada and CTMA

Turkey Production Timeline



Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 90 eggs during their 25 week lay period. These eggs are set into incubators for 4 weeks resulting in poults that are placed for commercial production.

Source : National Farm Products Council

Turkey Farm Cash Receipts (FCR) - 2003

	FCR ($000)	Share of Turkey Market %	Turkey FCR vs Total FCR %
B.C.	27,020	10.4	1.2
Alta.	23,230	8.9	0.3
Sask.	9,151	3.5	0.2
Man.	18,098	6.9	0.5
Ont.	117,839	45.2	1.4
Que.	54,877	21.1	0.9
N.B.	4,225	1.6	1.1
N.S.	6,147	2.4	1.5
P.E.I. and Nfld. *	70	--	--
Canada	260,657	100.0	0.8
West	77,499	29.7	0.4
Central	172,716	66.3	1.2
East	10,442	4.0	0.8

* combined due to confidentiality

-- amount too small to be expressed

Source : Statistics Canada

Turkey Exports

	2003		1999	
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)
United States	6.3	1.6	2.9	0.9
South Africa	2.5	4.3	1.1	0.9
Russia	2.3	3.1	0.6	1.1
Hong Kong	0.8	0.8	0.1	0.2
Philippines	0.5	0.9	0.5	0.8
Bulgaria	0.4	0.5	-	-
Others	4.0	5.2	4.9	6.0
Total	16.8	16.4	10.1	9.9

Source : Statistics Canada

In 2003, the value of turkey exports decreased slightly to $16.8 million. The U.S. returned to its position of leading importer of Canadian turkey products. Canadian exports to Russia had risen significantly in 2002 due to Russia's imposition of a ban on poultry products coming from the U.S.

In 2003, Russia lifted the ban on U.S. products The U.S. continues to be our best market for high value prepared foods such as dinners and deli meats, which made up almost 50% of their total imports from Canada.

Volume of Turkey Imports

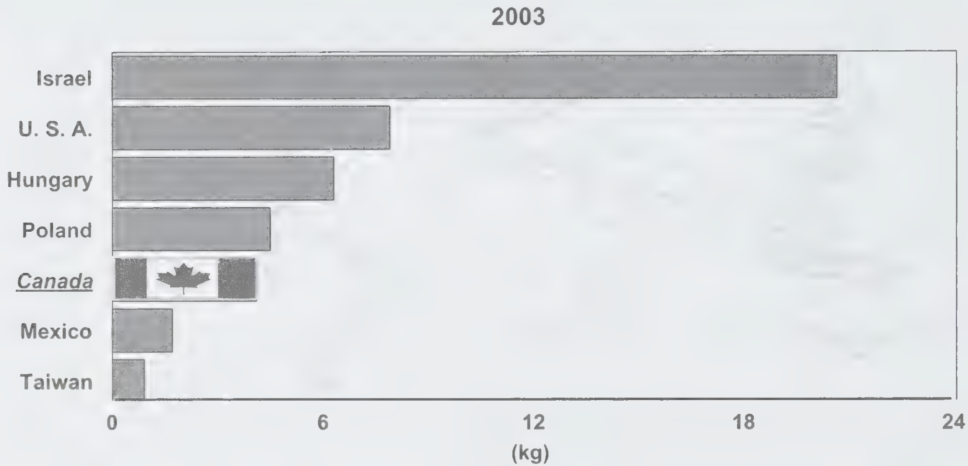
	2003 (000 000 kg)	%	1999 (000 000 kg)	%
Live	-	-	0.5	10.0
Boneless- Breasts	2.3	32.9	2.2	44.0
Boneless - Other	0.5	7.1	0.6	12.0
Boneless - Cooked	0.5	7.1	0.2	4.0
Bone-In Parts	0.1	1.4	0.4	8.0
Others	0.1	1.4	0.6	12.0
Further Processed	3.5	50.0	0.5	10.0
Total	7.0	100.0	5.0	100.0

Source : Agriculture and Agri-Food Canada, actual weight.

The importation of turkey is based on a Tariff Rate Quota (TRQ) system with a WTO access level of 5.6 million kg eviscerated weight basis. Special supplementary permits may be issued over and above the TRQ access level.

In 2003, meat imported for re-export made up 17% of total imports. To date, all turkey meat imports have originated in the U.S. These imports were valued at $23 million in 2003 a drop of $3.1 million compared to 2002.

Turkey Meat Per Capita Consumption - by Country

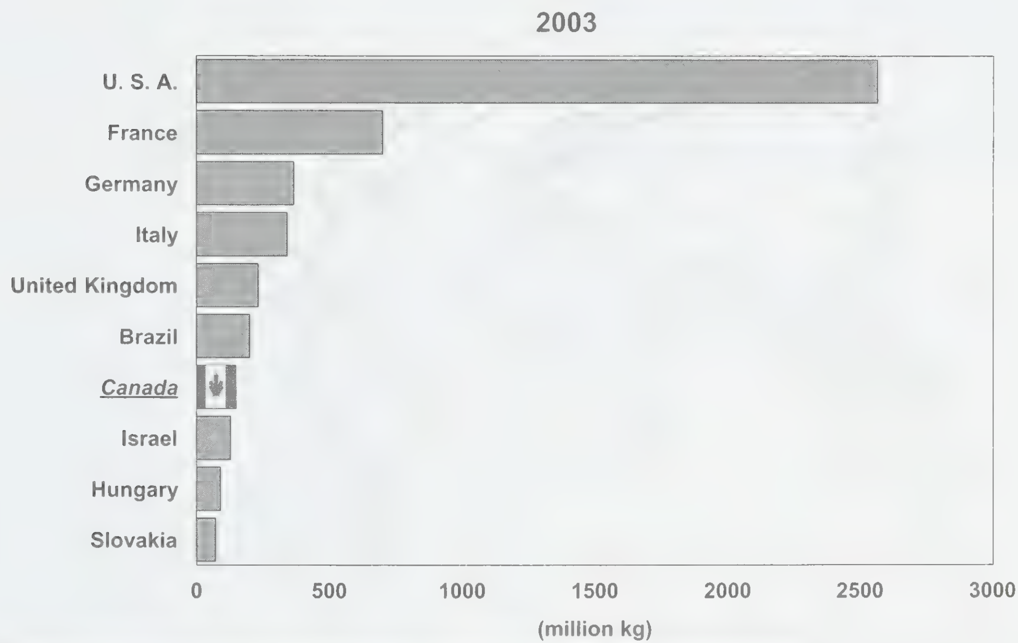


Israeli's have the distinction of being the world's top consumers of turkey. However, Israeli's turkey per capita consumption figures published in the past have been underreported.

Production numbers have now been revised by the Food and Agriculture Organization. This year's correct per capita consumption for Israel is 20.6 kg/person.

Source United States Department of Agriculture, Food and Agriculture Organization and Agriculture and Agri-Food Canada

Largest Turkey Meat Producing Countries



Source : United States Department of Agriculture, Food and Agriculture Organization and Agriculture and Agri-Food Canada

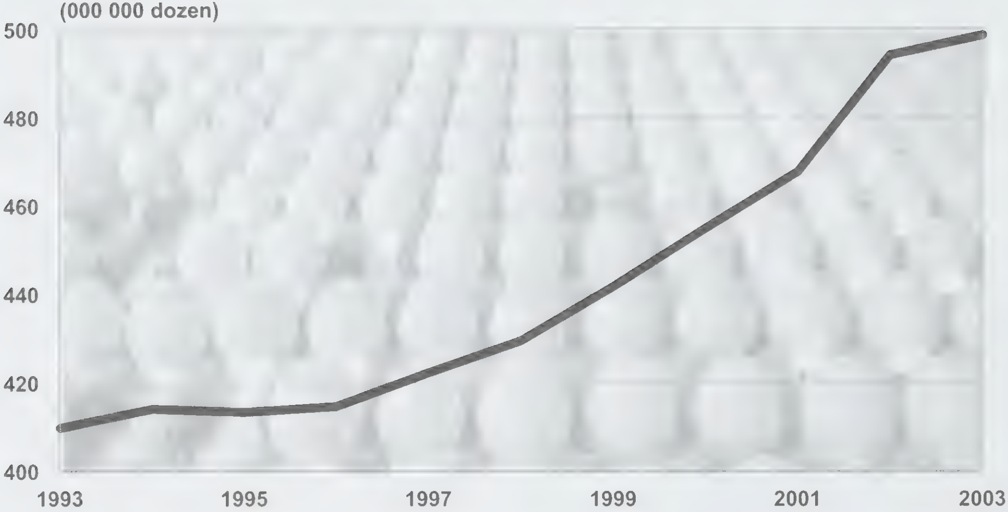
Notes

EGGS

Egg Highlights	2003	2002	2001	2000	1999
Number of Producers	1,101	1,128	1,146	1,147	1,177
Farm Cash Receipts ($000 000)	556.4	584.1	565.4	513.6	484.1
CEMA Production (000 000 dozen)	498.5	494.6	474.1	461.7	451.7
Per Capita Consumption (dozen)	15.6	15.4	15.9	15.7	15.3
Consumer Price Index (1992=100)	140.4	133.9	129.3	124.0	122.3
Exports ($000 000)	42.9	41.7	30.7	26.2	25.3
Imports ($000 000)	34.5	31.6	30.8	26.9	30.6

Egg Production

1993 - 2003



Since 1993, egg production has increased 22%.

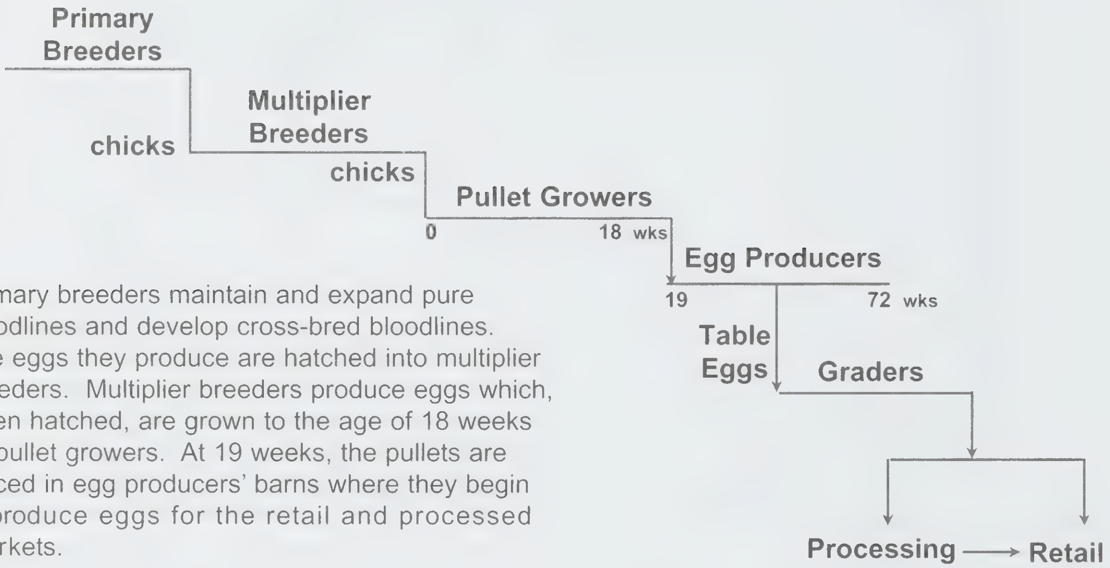
Source : 1993 : Agriculture and Agri-Food Canada
1994-2003 : CEMA

Egg Production - 2003

	Production (000 dozen)	Market Share %
B.C.	60,706	12.2
Alta.	39,356	7.9
N.W.T.	2,041	0.4
Sask.	19,524	3.9
Man.	54,316	10.9
Ont.	187,152	37.5
Que.	95,360	19.1
N.B.	10,779	2.2
N.S.	17,591	3.5
P.E.I.	3,148	0.6
Nfld.	8,493	1.7
Canada	498,466	100.0
West	175,943	35.3
Central	282,512	56.7
East	40,011	8.0

Source : CEMA

Egg Production Timeline



Primary breeders maintain and expand pure bloodlines and develop cross-bred bloodlines. The eggs they produce are hatched into multiplier breeders. Multiplier breeders produce eggs which, when hatched, are grown to the age of 18 weeks by pullet growers. At 19 weeks, the pullets are placed in egg producers' barns where they begin to produce eggs for the retail and processed markets.

Source : National Farm Products Council

Egg Farm Cash Receipts (FCR) - 2003

	FCR ($000)	Share of Egg Market %	Egg FCR vs Total FCR %
B.C.	71,836	12.9	3.1
Alta.	41,982	7.5	0.6
Sask.	21,427	3.9	0.4
Man.	62,980	11.3	1.8
Ont.	200,188	36.0	2.4
Que.	100,772	18.1	1.7
N.B.	16,036	2.9	4.0
N.S.	25,430	4.6	6.1
P.E.I.	4,120	0.7	1.2
Nfld.	11,644	2.1	14.2
Canada	556,415	100.0	1.6

West	198,225	35.6	1.1
Central	300,960	54.1	2.1
East	57,230	10.3	4.6

Note : Statistics Canada does not publish FCR for N.W.T.

Source : Statistics Canada

Egg Product Exports - by Country

	2003		1999	
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)
Japan	22.1	3.6	17.0	2.2
United States	12.9	5.3	4.3	2.4
Taiwan	1.3	0.3	-	-
Others	6.6	1.5	4.0	0.9
Total	42.9	10.7	25.3	5.5

Source : Statistics Canada

The value of egg product exports has increased by 70% in the last five years. Exports to Japan have risen by 30% in that period. Japan continues to be Canada's largest market for egg products - as the destination for just over half of the total.

Exports to the US have tripled since 1999, and account for one third of the total.

The export data in the above table includes eggs and egg products imported for re-export. Canada exports virtually no shell eggs.

Egg Product Exports - by Category

	2003		1999	
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)
Whole Egg - Liquid/Frozen	1.8	1.1	0.7	0.4
Whole Egg - Dried	7.4	1.4	2.4	0.5
Egg Albumen - Liquid/Frozen	2.0	1.7	1.4	1.2
Egg Albumen - Dried	17.1	2.0	13.2	1.4
Egg Yolks - Liquid/Frozen	7.2	2.8	1.9	0.8
Egg Yolks - Dried	7.4	1.7	5.7	1.1
Total	42.9	10.7	25.3	5.4

Note : Exports of shell eggs are minimal

Source : Statistics Canada

Five years ago, dried egg albumen made up over half of the value of egg product exports. Dried yolks made up almost one quarter.

In 2003, exports were almost equally split between albumen and yolks, with 40% being dried albumen and 34% being yolks in either liquid/frozen or dried form.

Egg Imports

	2003		1999	
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)
Whole Egg - Liquid/Frozen	1.2	0.8	2.4	1.8
Whole Egg - Dried	1.8	1.1	1.9	1.3
Egg Albumen - Liquid/Frozen	6.4	7.2	2.6	2.9
Egg Albumen - Dried	1.6	0.2	2.1	0.2
Egg Yolks - Liquid/Frozen	3.8	1.8	2.6	1.5
Egg Yolks - Dried	0.3	--	0.1	--
Egg Preparation	3.1	1.3	2.3	1.1
Shell Eggs (liquid equivalent)	16.3	9.9	16.6	15.8
Total	34.5	22.3	30.6	24.6

-- amount too small to be expressed

Source : Statistics Canada

Under Canada's WTO commitment, the TRQ import access level is 21,370,000 dozen (egg equivalent). In 2003, Canada imported the equivalent of 32.7 million dozen eggs. Of the egg products imported, 54% were imported for re-export. Only a minimal amount of shell is imported for re-export.

Urner Barry reports that egg prices set an all-time record high in 2003, following four consecutive years of low prices. Urner Barry is a business publisher in the United States that specializes in market news related to the food industry.

CEMA's Industrial Product Volumes

(000 dozen)

	2003	1999
B.C.	12,207	8,109
Alta.	6,752	4,471
N.W.T.	1,980	- *
Sask.	3,073	3,696
Man.	25,738	26,779
Ont.	34,284	33,106
Que.	12,889	5,722
N.B.	3,284	1,779
N.S.	5,478	4,845
P.E.I.	1,519	833
Nfld.	3,753	1,825
Canada	110,958	91,165

Source : CEMA

* N.W.T. was not part of the national system in 1999.

Industrial product refers to eggs that are in excess of local or provincial requirements for the table market. These eggs are sold by CEMA to egg processors for the production of dried, liquid and cooked eggs. Since 1999, the quantity of eggs declared as industrial product has increased 22%, mainly due to increased demand for processed egg products.

Processed Egg Production

(000 kg liquid equivalent)

	2003	2002	2001	2000	1999
Whole Egg	40.2	38.1	35.5	38.5	32.7
Yolk	12.4	15.6	13.5	12.1	11.0
Albumen	23.9	29.3	24.9	22.5	20.0
Total	76.5	83.0	73.9	73.1	63.7

Source : Agriculture and Agri-Food Canada

Eggs Broken for Processing

(000 Dozen)

	2003	2002	2001	2000	1999
Eggs	143,222	160,151	143,697	134,664	116,482

Source : Agriculture and Agri-Food Canada

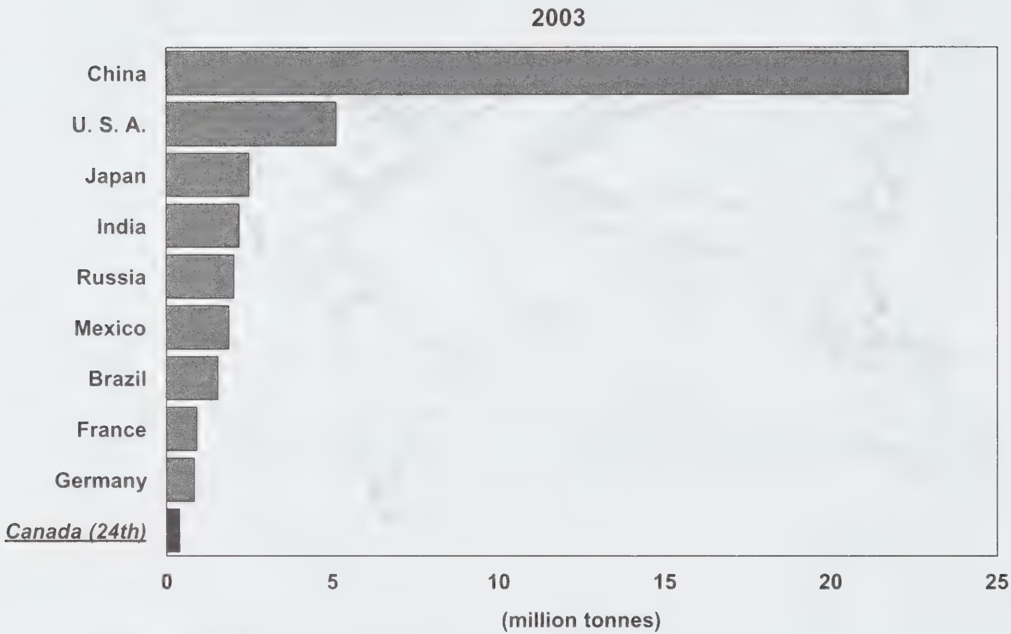
Per Capita Consumption of Shell and Processed Eggs

(Dozens / Person)

	2003	2002	2001	2000	1999
Processed Egg	3.8	3.9	3.7	3.8	3.3
Shell Egg	11.8	11.5	12.2	11.9	12.0
Total Domestic Consumption	15.6	15.4	15.9	15.7	15.3

Source : Statistics Canada and CEMA

Largest Egg Producing Countries



Source : Food and Agriculture Organization of the United Nations

Notes

Notes

Industry Contacts

Chicken Farmers of Canada
350 Sparks St., Suite 1007
Ottawa, Ontario
K1R 7S8
Phone: (613) 241-2800
Fax: (613) 241-5999
Website: www.chicken.ca
Contact: Mr. Mike Dungate, General Manager

Canadian Turkey Marketing Agency
7145 West Credit Avenue, Building #1, Suite 202
Mississauga, Ontario
L5N 6J7
Phone: (905) 812-3140
Fax: (905) 812-9326
Website: www.canadianturkey.ca
Contact: Mr. Phil Boyd, Executive Director

Canadian Egg Marketing Agency
1501 - 112 Kent Street
Ottawa, Ontario
K1P 5P2
Phone: (613) 238-2514
Fax: (613) 238-1967
Website: www.canadaegg.ca
Contact: Mr. Tim Lambert, Executive Director

Canadian Poultry and Egg
Processors Council
1545 Carling Avenue, Suite 400
Ottawa, Ontario
K1Z 8P9
Phone: (613) 724-6605
Fax: (613) 724-4577
Website: www.cpepc.ca
Contact: Mr. Robin Horel, President and CEO

Canadian Broiler Hatching Egg
Marketing Agency
75 Albert Street, Suite 1101
Ottawa, Ontario
K1P 5E7
Phone: (613) 232-3023
Fax: (613) 232-5241
Website: www.cbhema.com
Contact: Mr. Errol Halkai, General Manager

Further Poultry Processors
Association of Canada
2525 St. Laurent Blvd., Suite 203
Ottawa, Ontario
K1G 4K6
Phone: (613) 738-1175
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Website: www3.sympatico.ca/fppac
Contact: Mr. Robert DeValk, General Manager

www.nfpc-cnpa.gc.ca

NFPC CNPA

National Farm Products Council

Conseil national des produits agricoles

Canada 2005

Poultry and Egg Industry

(data 2004)

Industrie de la volaille et des oeufs

(données de 2004)

Canada

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Introduction

Welcome to the 2005 edition of the National Farm Products Council's (NFPC) Poultry and Egg Industry handbook. This reference guide uses 2004 data obtained from industry and government relating to the poultry meat and egg industry.

Canada's poultry and egg industry operates within an orderly marketing framework called supply management. There are four national marketing agencies - the Canadian Egg Marketing Agency (CEMA) established in 1972, the Canadian Turkey Marketing Agency (CTMA) established in 1974, the Chicken Farmers of Canada (CFC) established in 1978 and the Canadian Broiler Hatching Egg Marketing Agency (CBHEMA) established in 1986.

The NFPC oversees the operations of the four marketing agencies, reviews orders and regulations made by the agencies and considers complaints brought against agency decisions.

The NFPC also works closely with provincial and territorial government agencies that are responsible for supervising commodity boards at the provincial level. The NFPC along with its provincial and territorial counterparts have established the National Association of Agri-Food Supervisory Agencies as a forum to discuss issues of common interest.

Introduction

Le Conseil national des produits agricoles (CNPA) vous présente avec fierté la version 2005 de son Recueil de données pour l'industrie de la volaille et des oeufs. Ce guide de référence utilise les données recueillies pour 2004 auprès de l'industrie et du gouvernement concernant l'industrie de la viande de volaille et des oeufs.

L'industrie canadienne de la volaille et des oeufs opère dans un cadre de commercialisation méthodique appelé " gestion de l'offre ". Elle dispose de quatre offices canadiens de commercialisation : l'Office canadien de commercialisation des oeufs (OCCO) établi en 1972, l'Office canadien de commercialisation du dindon (OCCD) établi en 1974, les Producteurs de poulet du Canada (PPC) établis en 1978 et l'Office canadien de commercialisation des oeufs d'incubation de poulet à chair (OCCOIPC) établi en 1986.

Le CNPA supervise les activités des offices canadiens de commercialisation, examine les ordonnances et règlements pris par ces offices et instruit les plaintes déposées contre les décisions prises par ces mêmes offices.

En outre, le CNPA travaille en étroite coopération avec les organismes établis par les gouvernements provinciaux et territoriaux pour superviser les activités de leurs propres offices de commercialisation. De concert avec ses homologues provinciaux et territoriaux, le CNPA a établi l'Association nationale des régies agroalimentaires, qui constitue un forum où les offices canadiens peuvent discuter de questions d'intérêt mutuel.

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Canada's Poultry Industry - At a glance

In 2004, there were 4,679 poultry and egg producers in Canada (page 3), producing almost 1.1 billion kg of chicken and turkey meat and over 475 million dozen eggs (page 7). In addition to the producers, there are 69 federally registered poultry hatcheries, 127 federally and provincially registered primary processing establishments, 30 egg stock hatcheries, 313 egg grading stations and 17 egg processing plants (page 4).

Poultry and egg farm cash receipts (page 6) totalled $2.6 billion, making up 7.1% of total agricultural receipts. This is up 2.5% from the previous year. Farm cash receipts measure the gross revenue of farm businesses in current dollars. They include sales of crops and livestock products (except sales between farms in the same province) and program payments. Receipts are recorded when the money is paid to farmers before any expenses are paid.

Poultry and egg exports (page 8) were valued at $232 million in 2004, up 14% from 2003 and 82% from five years ago. Chicken made up 73% of total exports, eggs 18%, and turkey 9%. Most egg exports are not "in the shell", but consist of liquid and dried products.

There is an import for re-export program for poultry meat and eggs, under which these products can be imported into Canada for processing into value-added products. These products must subsequently be re-exported. The exports shown on page 8 include poultry meat and egg products of both domestic and foreign origin.

Imports of poultry and eggs (page 8) were valued at $546.3 million in 2004, up 30% from 2003 and 47% from five years ago. This large increase reflects the additional product required to supply the domestic market as a result of avian influenza disease in British Columbia in early 2004. Chicken made up 78% of the total imports, while eggs and egg products accounted for 10%, hatching eggs 6% and turkey 6%.

Import permits for poultry and eggs are administered by International Trade Canada (ITCan) under a Tariff Rate Quota (TRQ) system. For each commodity, a level of within-quota access is established according to commitments made under multi-lateral and bi-lateral trade agreements. This product may enter at a zero or minimal tariff rate, depending on the agreement. See page 12 for a detailed breakdown of TRQs.

Per Capita Consumption (page 9) was 30.4 kilograms for chicken and 4.2 kilograms for turkey. Egg consumption remains stable at 15.4 dozens per person.

L'industrie avicole canadienne - Coup d'oeil

En 2004, le Canada comptait 4 679 producteurs de volaille et d'oeufs (page 3), qui ont commercialisé presque 1,1 milliard de kg de viande de poulet et de dindon et plus de 475 millions de douzaines d'oeufs (page 7). Ces producteurs étaient épaulés par 69 couvoirs enregistrés au fédéral et faisant l'incubation d'oeufs de type chair, 127 établissements de transformation primaire enregistrés au fédéral et au provincial, 30 couvoirs faisant l'incubation d'oeufs de type ponte, 313 postes de classement d'oeufs et 17 usines de transformation d'oeufs (page 4).

Les recettes agricoles tirées de la volaille et des oeufs (page 6) se sont élevées à 2,6 milliards $, constituant 7,1 % des recettes agricoles totales. Il s'agissait d'une hausse de 2,5 % par rapport à l'année précédente. Les recettes agricoles fournissent une mesure des recettes brutes des exploitations agricoles en dollars constants. Elles comprennent les ventes de récoltes et de produits des troupeaux (sauf les ventes entre exploitations agricoles d'une même province) et les paiements reçus dans le cadre d'un programme. Le montant brut de ces recettes est calculé avant déduction de toute dépense.

Les exportations de volaille et d'oeufs (page 8) ont été estimées à 232 millions $ en 2004, une hausse de 14 % par rapport à 2003 et de 82 % durant les cinq dernières années. Le poulet a constitué 73 % des exportations totales, celles d'oeufs 18 % et celles de dindon 9 %. En majorité, les oeufs ont été exportés non pas " en coquille ", mais plutôt sous forme liquide ou déshydratée.

L'industrie exploite des programmes d'importation de viande de volaille et d'oeufs aux fins de réexportation, en vertu desquels ces produits peuvent être importés au Canada pour transformation en produits à valeur ajoutée. Ces produits doivent ultérieurement être réexportés. Les exportations indiquées à la page 8 comprennent les produits à base de viande de volaille et d'oeufs, qu'ils aient été produits au Canada ou à l'étranger.

Les importations de volaille et d'oeufs (page 8) se sont élevées à 546,3 millions $ en 2004, une hausse de 30 % par rapport à 2003 et de 47 % durant les cinq dernières années. Cette forte augmentation est résultée des quantités supplémentaires requises pour approvisionner le marché intérieur par suite de la flambée de grippe aviaire en Colombie-Britannique au début de 2004. Le poulet a constitué 78 % des importations totales, les oeufs et les produits des oeufs 10 %, les oeufs d'incubation 6 % et le dindon 6 %.

Les licences d'importation pour la volaille et les oeufs sont octroyées par Commerce international Canada (CICan) dans le cadre d'un régime de contingents tarifaires. Pour chaque denrée, un niveau d'accès ne dépassant pas le contingent tarifaire est établi en fonction des engagements pris en vertu des accords commerciaux multilatéraux et bilatéraux. Les produits ainsi désignés peuvent être importés à un tarif zéro ou minime, selon l'accord. Pour une ventilation des contingents tarifaires, consulter la page 12.

La consommation par habitant (page 9) s'est élevée à 30,4 kilogrammes pour le poulet et à 4,2 kilogrammes for le dindon. Pour les oeufs, elle est restée stable, à 15,4 douzaines.

Number of Poultry and Egg Producers - 2004
Nombre de producteurs de volaille et d'oeufs - 2004

Prov	Chicken Poulet	Turkey Dindon	Eggs Oeufs	Broiler Hatching Eggs Oeufs d'incubation de poulet à chair	Total
BC	330	49	127	62	568
AB	290	56	167	37	550
NT	-	-	2	-	2
SK	96	17	64	11	188
MB	118	66	168	29	381
ON	1,091	180	379	84	1,734
QC	726	140	107	49	1,022
NB	36	7	18	3	64
NS	85	23	24	1	133
PE	7	-	11	-	18
NL	8	-	11	-	19
Canada	2,787	538	1,078	276	4,679

Source: 4 national marketing agencies • les quatre offices canadiens de commercialisation.

Hatcheries, Processing Plants and Grading Stations
Couvoirs, usines de transformation et postes de classement

	Poultry/Volaille		Eggs/Oeufs		
Prov	Hatcheries Couvoirs	Primary Processing * Transformation de premier cycle *	Egg Stock Hatcheries Couvoirs de type ponte	Grading Stations Postes de classement	Egg Processing Transformation d'oeufs
BC	8	13	2	35	1
AB	8	9	7	52	2
NT and/et /YT	0	0	0	2	0
SK	4	2	2	25	0
MB	8	5	3	30	2
ON	20	64	7	89	9
QC	15	17	5	34	3
NB	2	4	3	17	0
NS	3	7	1	16	0
PE	0	1	0	7	0
NL	1	5	0	6	0
Canada	69	127	30	313	17

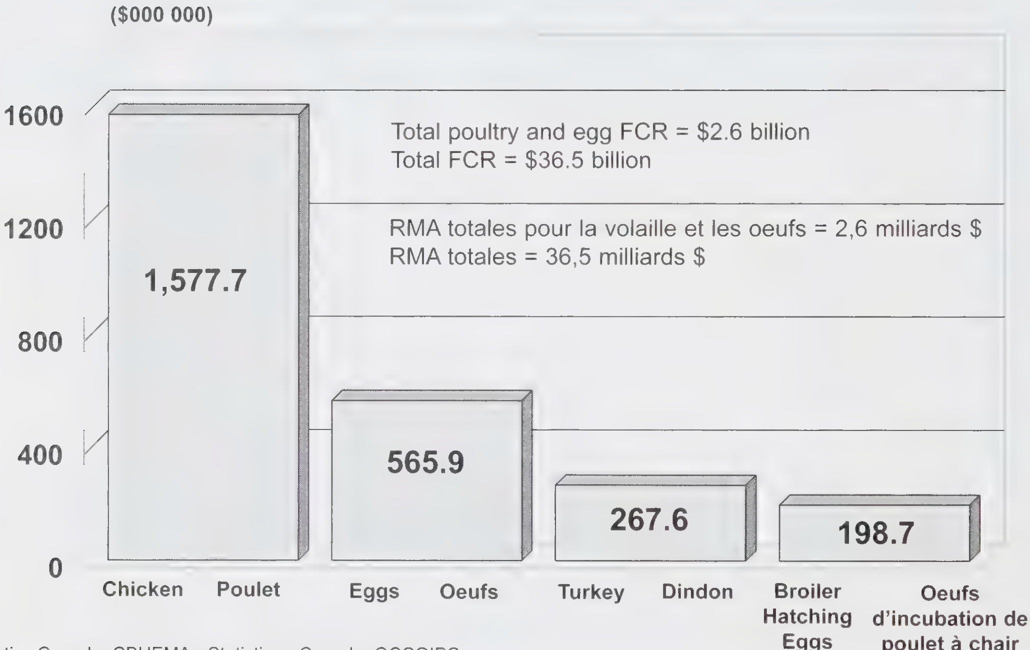
* Primary Processing includes federally and provincially registered establishments but excludes Hutterite colonies.

* La transformation de premier cycle comprend les établissements enregistrés au fédéral et au provincial mais exclut les colonies hutterites.

Source: Agriculture and Agri-Food Canada, National Farm Products Council

: Agriculture et Agroalimentaire Canada, Conseil national des produits agricoles

Farm Cash Receipts (FCR)
Recettes monétaires agricoles (RMA)
2004



Source: Statistics Canada, CBHEMA • Statistique Canada, OCCOIPC

Farm Cash Receipts (FCR) - 2004
Recettes monétaires agricoles (RMA) - 2004

($000 000)

Prov	Chicken Poulet	Turkey Dindon	Eggs Oeufs	Broiler Hatching Eggs Oeufs d'incubation de poulet à chair	Total	Poultry and Egg as a % of Total FCR Volaille et oeufs en % des RMA totales
BC	205.4	23.0	46.7	20.6	295.7	12.3
AB	138.6	23.6	45.9	23.5	231.6	2.9
SK	55.4	8.9	22.6	7.1	94.0	1.6
MB	67.1	17.3	65.6	9.4	159.4	4.1
ON	531.1	126.2	222.0	65.9	945.1	10.9
QC	447.8	58.1	102.6	54.6	663.1	10.5
NB	47.1	4.1	17.2	17.6 *	x	N/A
NS	58.2	6.5	26.0	*	x	N/A
PE	x	x	4.1	x	x	N/A
NL	x	x	13.3	x	x	N/A
Canada	1,577.7	267.6	565.9 **	198.7	2,609.9	7.1

* combined due to confidentiality • chiffres regroupés pour en protéger la confidentialité

x - confidential • confidentiel

** includes $15.3 million for hatching eggs • inclut 15,3 millions $ pour les oeufs d'incubation

Note : Statistics Canada does not publish FCR for the NT. • Remarque : Statistique Canada ne publie pas les RMA des T.N.-O.

Source : Statistics Canada except for Hatching Eggs where FCR are calculated by CBHEMA

: Statistique Canada, sauf pour le segment des oeufs d'incubation de poulet à chair dont les chiffres proviennent de l'OCCOIPC.

Production by Province and Territory - 2004
Production par province et territoire - 2004

Prov	Chicken Poulet (000) kg	Turkey Dindon (000) kg	Eggs Oeufs (000) (dozen/douzaines)	Broiler Hatching Eggs Oeufs d'incubation de poulet à chair (000) (eggs/oeufs)
BC	120,466	12,773	37,227	65,896
AB	86,946	11,917	40,659	75,673
NT	-	-	1,589	-
SK	33,156	4,881	20,370	22,863
MB	39,980	9,482	54,023	31,161
ON	319,760	67,902	189,685	221,225
QC	269,120	31,478	95,037	185,804
NB	26,786	2,329	10,709	59,148 *
NS	33,393	3,516	17,847	*
PE	3,578	-	3,146	-
NL	13,051	-	8,418	-
Canada	946,236	144,278	478,709	661,769

* For Broiler Hatching Eggs, production for NB and NS is shown under NB

* Pour les oeufs d'incubation de poulet à chair, la production de la N.-É. est regroupée avec celle du N.-B.

Source: 4 national marketing agencies • les quatre offices canadiens de commercialisation.

Value of Exports and Imports
Valeur des exportations et des importations
($000 000)

	Chicken Poulet		Turkey Dindon		Eggs and Egg Products Oeufs et produits d'oeufs		Hatching Eggs & Broiler Chicks Oeufs d'incubation et poussins destinés au gril	
	Exports/ Export.	Imports Import.	Exports Export.	Imports Import.	Exports Export.	Imports Import.	Exports Export.	Imports Import.
2004	169.4	422.3	21.6	32.6	40.6	59.4	*	32.1
2003	143.4	335.8	16.8	23.3	42.9	37.5	*	25.1
2002	151.6	353.4	17.1	26.5	41.7	31.6	*	35.2
2001	131.7	341.4	18.2	23.8	30.7	30.8	*	36.2
2000	87.6	294.3	13.2	18.7	26.2	26.9	*	28.9

* Exports for broiler hatching eggs are minimal • Les exportations d'oeufs d'incubation de poulet à chair sont minimes.

Source: Statistics Canada • Statistique Canada

Per Capita Consumption
Consommation par personne

	Beef Boeuf (kg)	Chicken Poulet (kg)	Pork Porc (kg)	Turkey Dindon (kg)	Table Eggs & Egg Products Oeufs de consommation et produits d'oeufs (dozen/douzaines)
2004	30.7	30.4	26.7	4.2	15.4
2003	32.0	30.1	25.1	4.1	15.6
2002	30.5	30.7	27.8	4.3	15.4
2001	30.7	30.5	28.9	4.2	15.9
2000	32.0	29.1	28.7	4.3	15.7

Source : Statistics Canada • Statistique Canada

Consumer Price Index (1992=100)
Indice des prix à la consommation (1992=100)

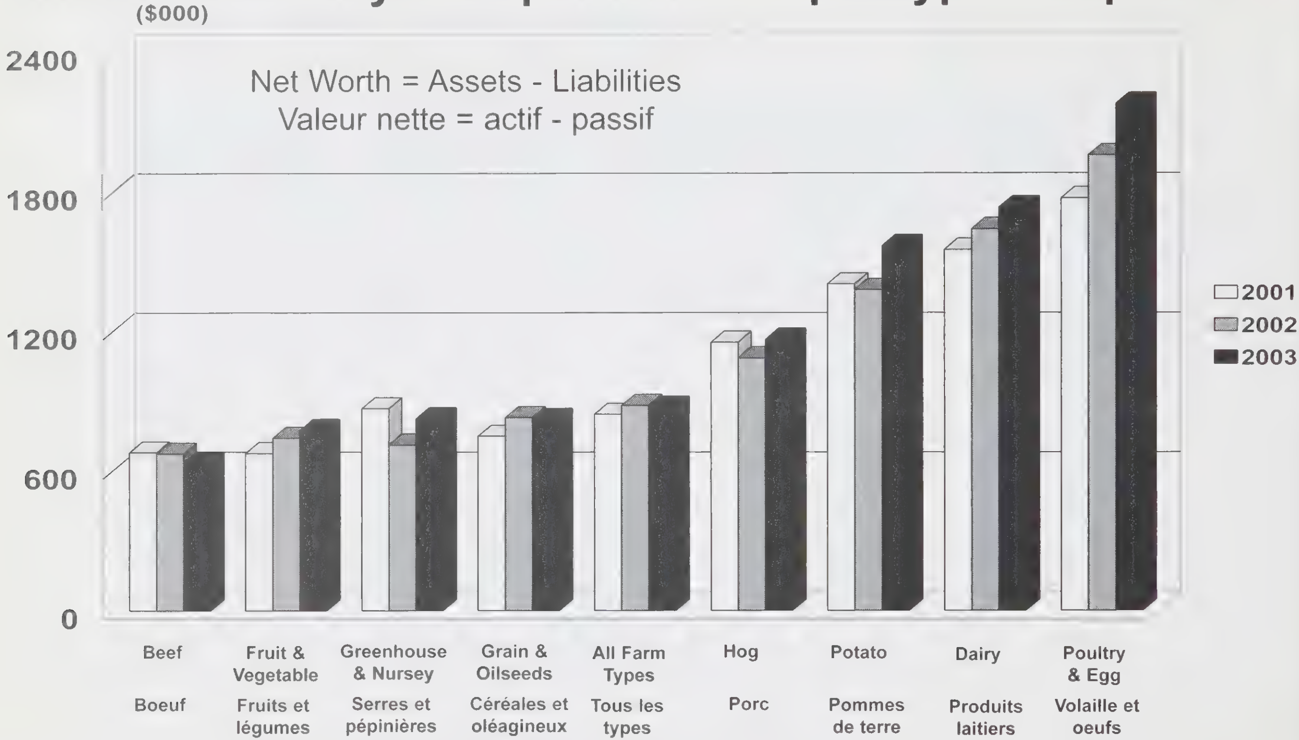
	Chicken Poulet	Turkey Dindon	Eggs Oeufs	Beef Boeuf	Pork Porc	All Foods Toutes denrées
2004	133.1	135.5	144.3	138.4	125.7	124.9
2003	123.6	131.7	140.4	133.8	118.9	122.4
2002	116.7	131.4	133.9	132.8	118.8	120.3
2001	116.2	128.4	129.3	128.2	122.4	117.2
2000	110.6	123.9	124.0	111.3	112.1	112.2

Source : Statistics Canada • Statistique Canada

Statistics Canada defines the Consumer Price Index (CPI) as an indicator of the changes in consumer prices experienced by Canadians. It is obtained by comparing, through time, the cost of a fixed basket of commodities purchased by Canadian consumers in a particular year. For example, the price for all foods in 2004 was 24.9% higher than it was in 1992.

Statistique Canada définit l'indice des prix à la consommation (IPC) comme un indicateur des changements dans les prix à la consommation payés par les Canadiens. Pour obtenir ces changements, on compare, durant certaines périodes de temps, le coût que doivent verser les consommateurs canadiens pour un même panier de marchandises. Par exemple, comme l'indique la page 10, le prix pour tous les aliments en 2004 était de 24,9 % supérieur à celui de 1992.

Average Net Worth per Farm, by Farm Type
Valeur nette moyenne par ferme et par type d'exploitation



Source : Agriculture and Agri-Food Farm Income Issues Data Source Book, February 2005

Source : Agriculture et Agroalimentaire Canada - Recueil de données sur les questions de revenu agricole, février 2005

Tariff Rated Quotas (TRQs)
Contingents tarifaires

PRODUCT	WTO Agreement Accord OMC	NAFTA ALENA	2004 TRQ Contingent tarifaire 2004	PRODUIT
Hatching Eggs and Chicks	**95.4** Million eggs / millions d'oeufs	**21.1%** of anticipated current year's production / de la production prévue pour l'année en cours	**141.4** Egg equivalent, Millions / millions (équivalent oeufs)	Oeufs d'incubation et poussins
Chicken	**39.9** Million Kgs eviscerated millions de kg (éviscéré)	**7.5%** of previous year's production / de la production de l'année précédente	**69.7** Million Kgs eviscerated / millions de kg (éviscéré)	Poulet
Turkey	**5.6** Million Kgs eviscerated / millions de kg (éviscéré)	**3.5%** of anticipated current year's production / de la production prévue pour l'année en cours	**5.6** Million Kgs eviscerated / millions de kg (éviscéré)	Dindon
Egg and Egg products	**21.4** Million Dozen / millions de douzaines	**2.988%** of previous year's production / de la production de l'année précédente	**21.4** Million Dozen / millions de douzaines	Oeufs et produits d'oeufs

Source: Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Broiler Hatching Eggs - 2004 Hightlights

The outbreak of AI in British Columbia resulted in almost half the breeder birds in the Fraser Valley being destroyed and all hatchery operations in the Fraser Valley being shut down until mid July 2004 when production was allowed to resume. However, with aging flocks and lack of replacement stock, production levels declined. This condition lasted the entire 2004 year but returned to full production by the summer of 2005.

Hatching egg production (page 16) in 2004 totalled 661.8 million eggs, 3.5% lower than last year with British Columbia's production down 40.5% from 2003. To augment the domestic supplies, hatchery imports increased by 29.9% (page 18) with imports into B.C. up 107.5 % over last year.

Imports into Saskatchewan were 366% higher in 2004 due to the drop in broiler hatching egg production in that province. Its hatcheries were required to import 3.8 million broiler hatching eggs to supply the market.

Oeufs d'incubation de poulet à chair - Points saillants pour 2004

La flambée de grippe aviaire en C.-B. a nécessité la destruction de pratiquement la moitié des oiseaux reproducteurs dans la Vallée du Fraser et la fermeture complète des couvoirs exploités dans cette région jusqu'à ce que soit autorisée la reprise de la production, à la mi juillet 2004. Toutefois, vu le vieillissement des troupeaux et l'insuffisance des stocks de remplacement, les niveaux de production ont baissé. Cette situation a duré toute l'année 2004, mais la production est revenue à la normale à l'été 2005.

La production d'oeufs d'incubation (page 16) en 2004 a été de 661,8 millions d'oeufs, un niveau de 3,5 % inférieur à celui de l'année précédente par suite d'une diminution de 40,5 % dans la production de la C.-B. durant cette période. Pour assurer l'approvisionnement du marché intérieur, les couvoirs ont augmenté de 29,9 % leurs importations (page 18), la quantité importée par la C.-B. dépassant de 107,5 % celle de l'année précédente.

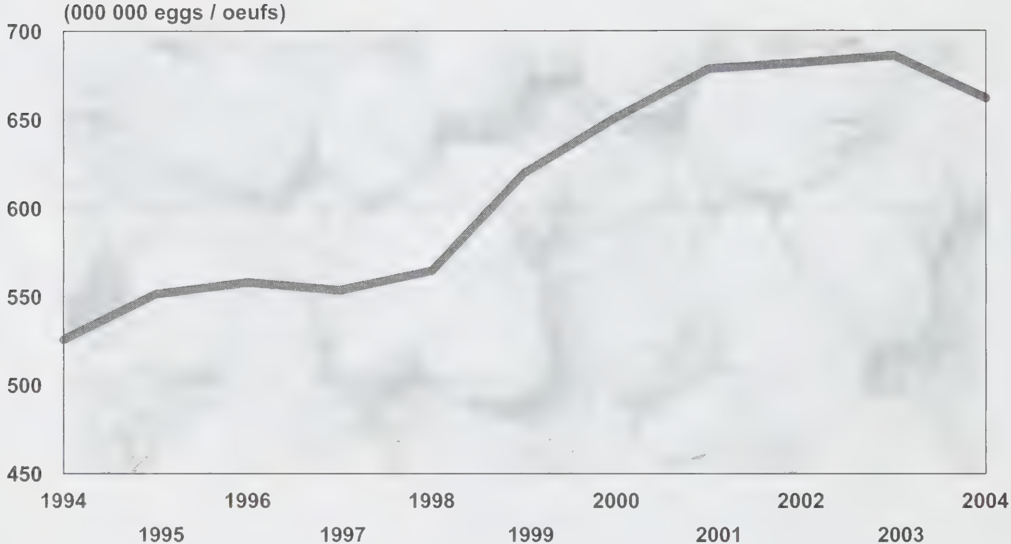
Les importations en Saskatchewan ont grimpé de 366 % en 2004 à cause de la chute de la production d'oeufs d'incubation de poulet à chair dans cette province. Pour combler les besoins de leur marché, les couvoirs ont dû importer 3,8 millions d'oeufs d'incubation de poulet à chair.

Broiler Hatching Eggs / Oeufs d'incubation de poulet à chair

Highlights / Points saillants

	2004	2003	2002	2001	2000
Number of Producers **Nombre de producteurs**	276	283	289	300	300
Farm Cash Receipts ($000 000) **Recettes monétaires agricoles (000 000 $)**	198.7	205.7	206.5	205.2	195.4
Production (000 000 eggs) **Production (000 000 oeufs)**	661.8	685.9	681.7	678.4	651.1
Imports - Hatching Eggs ($000 000) **Importations - Oeufs d'incubation (000 000 $)**	27.2	19.6	27.5	28.3	23.4
Imports - Broiler Chicks ($000 000) **Importations - Poussins destinés au gril (000 000 $)**	4.9	5.5	7.6	8.0	5.5

Broiler Hatching Egg Production
Production d'oeufs d'incubation de poulet à chair
1994 - 2004



Source : CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Broiler Hatching Egg Production
Production d'oeufs d'incubation de poulet à chair

Prov	2004 Production (000) (eggs/oeufs)	2003 Production (000) (eggs/oeufs)	2004/2003 Change Changement %	2004 % Canadian Total % du total canadien %
BC	65,896	110,705	-40.5	10.0
AB	75,673	73,511	2.9	11.4
SK	22,863	25,129	-9.0	3.5
MB	31,161	28,921	7.7	4.7
ON	221,225	207,800	6.5	33.4
QC	185,804	184,760	0.6	28.1
NB and/et NS *	59,148	55,024	7.5	8.9
Canada	661,769	685,850	-3.5	100.0
West/Ouest	195,593	238,266	-17.9	29.6
Central/Centre	407,028	392,560	3.7	61.5
East/Est	59,148	55,024	7.5	8.9

* combined due to confidentiality • chiffres regroupés pour en protéger la confidentialité

Source : CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Broiler Hatching Egg Farm Cash Receipts (FCR) - 2004
Recettes monétaires agricoles (RMA) - Oeufs d'incubation de poulet à chair - 2004

Prov	Broiler Hatching Egg FCR RMA des oeufs d'incubation de poulet à chair ($000)	% Canadian Total % du total canadien %	Broiler Hatching Egg FCR as a % of Total FCR RMA des oeufs d'incubation de poulet à chair en % des RMA totales %
BC	20,585	10.4	0.9
AB	23,474	11.8	0.3
SK	7,092	3.6	0.1
MB	9,448	4.8	0.2
ON	65,854	33.1	0.8
QC	54,582	27.5	0.9
NB and/et NS *	17,629	8.9	2.0
Canada	198,664	100.0	0.5

West/Ouest	60,599	30.5	0.3
Central/Centre	120,436	60.6	0.8
East/Est	17,629	8.9	2.0

* combined due to confidentiality • chiffres regroupés pour en protéger la confidentialité

Source : Estimated by CBHEMA • estimé par l'OCCOIPC

Imports of Broiler Hatching Eggs and Chicks *
Importations d'oeufs d'incubation de poulet à chair et de poussins *

Prov	2004 (000) (eggs/oeufs)	2003 (000) (eggs/oeufs)	2004/2003 Change Changement %
BC	50,657	24,417	107.5
AB	7,268	4,190	73.5
SK	4,845	1,039	366.4
MB	7,383	6,900	7.0
ON	24,596	30,327	-18.9
QC	42,540	36,156	17.7
NB and/et NS **	4,086	5,771	-29.2
Canada	141,375	108,801	29.9

West/Ouest	70,153	36,546	92.0
Central/Centre	67,136	66,483	1.0
East/Est	4,086	5,771	-29.2

* 1 chick = 1.27 eggs • 1 poussin = 1,27 oeufs

** combined due to confidentiality • chiffres regroupés pour en protéger la confidentialité

Source : CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Chicken - 2004 Highlights

It is estimated by the Chicken Farmers of Canada, that the AI outbreak in the Fraser Valley cost the province of British Columbia $60 million in farm cash receipts and approximately $100 million to the whole chicken industry. About 86% of B.C.'s chicken farmers are located within the Fraser Valley.

Nationally, chicken production in 2004 (page 24) was up 1.3% over 2003, however, production in B.C. was down 18.6%. This production shortfall resulted in a special supplementary import program being put into place. An advisory committee, made up of industry and provincial and federal representatives, determined the appropriate volumes required to supply B.C. processors. This special import totalled 16.1 million kg and was made up mostly of whole eviscerated birds.

In 2004, 107.3 million kg of chicken was imported (page 26), an increase of 14% from last year. Most of Canada's chicken imports (87.6 million kg) come from the U.S. However, Brazil continued its emergence as a significant source of supply for Canada in 2004, supplying 18.9 million kg, up dramatically from 2003 levels of 3.2 million kg.

Chicken meat imported for re-export was 32 million kg or 30% of total imports. This was an increase of 25% over 2003. Under this program products can be imported into Canada for processing into value-added products and subsequently must be re-exported within six months. The importation of chicken is based on a Tariff Rate Quota (TRQ) (page 12) system with a NAFTA access level of 7.5% of the previous year's production.

AI had a significant impact on exports (page 26) as over 40 countries closed their borders to either all Canadian chicken or chicken originating from B.C. The U.S. remained the most important market accounting for 28.1 million kg, followed by Hong Kong (7.4 million kg) and the Philippines (5.9 million kg). Exports to South Africa fell 67% from last year as South Africa was one of the markets that banned all chicken originating from Canada. Russia's restrictions were limited to only B.C., yet trade with Russia declined considerably, from 8.6 million kg in 2003 to 4.1 million kg in 2004.

Poulet - Points saillants pour 2004

Selon les Producteurs de poulet du Canada, la flambée de grippe aviaire dans la Vallée du Fraser a coûté à la province de la Colombie-Britannique 60 millions $ en recettes agricoles, mais quelque 100 millions $ à l'ensemble de l'industrie du poulet. Environ 86 % des producteurs de poulet de la C.-B. sont situés dans la Vallée du Fraser.

Par rapport à 2003, la production de poulet en 2004 (page 24) a augmenté de 1,3 % à l'échelle nationale, malgré un fléchissement de 18,6 % en C.-B. Ce fléchissement de la production a donné lieu à un programme spécial d'importations supplémentaires. Un comité consultatif, qui regroupait les représentants de l'industrie et des gouvernements provinciaux et fédéral, a déterminé les quantités appropriées pour approvisionner les transformateurs de la C.-B. Ces importations spéciales ont atteint 16,1 millions kg et consistaient en majeure partie d'oiseaux entiers éviscérés.

En 2004, le Canada a importé 107,3 millions kg de poulet (page 26), une augmentation de 14 % par rapport à l'année précédente. En majorité, le poulet importé (87,6 millions kg) venait des É.-U. Toutefois, le Brésil a continué à se tailler une place importante sur le marché canadien en 2004, fournissant 18,9 millions kg, une très forte hausse par rapport au niveau de 3,2 millions kg en 2003.

Les importations de viande de poulet destinée à la réexportation ont été de 32 millions kg, ce qui formait 30 % des importations totales. Ce niveau était de 25 % supérieur à celui de 2003. En vertu de ce programme, il est possible d'importer au Canada des produits destinés à être surtransformés en produits à valeur ajoutée et réexportés dans la période de six mois qui suit. L'importation de poulet est contrôlée dans le cadre d'un régime de contingents tarifaires (page 12) qui prévoit en vertu de l'ALENA un niveau d'accès de 7,5 % de la production de l'année précédente.

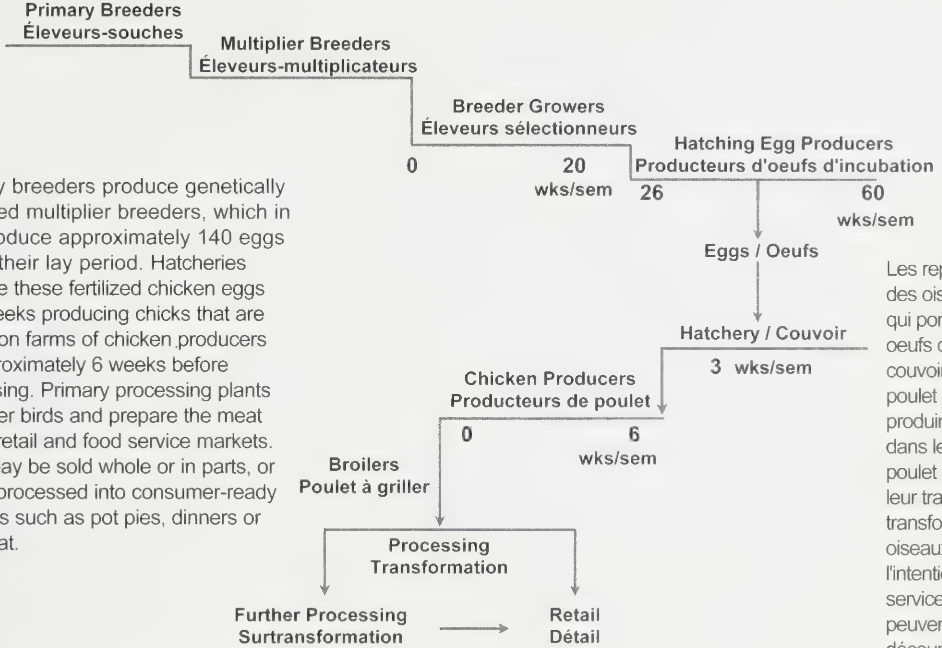
La flambée de grippe aviaire a eu des incidences considérables sur les exportations (page 26) car plus de 40 pays ont fermé leurs frontières à tout poulet provenant du Canada ou à celui provenant de la C.-B. Les É.-U. sont restés notre principal marché, absorbant 28,1 millions kg; ils ont été suivis par Hong Kong (7,4 millions kg) et les Philippines (5,9 millions kg). Les exportations vers l'Afrique du Sud ont diminué de 67 % par rapport à l'année précédente car ce pays était l'un de ceux qui ont interdit toute importation de poulet canadien. Les restrictions imposées par la Russie ont été limitées à la C.-B., mais le commerce avec la Russie a néanmoins diminué considérablement, passant de 8,6 millions kg en 2003 à 4,1 millions kg en 2004.

Chicken / Poulet

Highlights / Points saillants

	2004	2003	2002	2001	2000
Number of Producers **Nombre de producteurs**	2,787	2,808	2,851	2,815	2,817
Farm Cash Receipts ($000 000) **Recettes monétaires agricoles (000 000 $)**	1,577.7	1,524.4	1,452.9	1,522.3	1,368.1
Production (000 000 kg) **Production (000 000 kg)**	946.2	934.5	939.0	930.1	880.7
Per Capita Consumption (kg) **Consommation par habitant (kg)**	30.4	30.1	30.7	30.5	29.1
Consumer Price Index (1992=100) **Indice des prix à la consommation (1992=100)**	133.1	123.6	116.7	116.2	110.6
Exports ($000 000) **Exportations (000 000 $)**	169.4	143.4	151.6	131.7	87.6
Imports ($000 000) **Importations (000 000 $)**	422.3	335.8	353.4	341.4	294.3
Storage Stocks on December 31 (000 kg) **Stocks en entrepôt au 31 décembre (000 kg)**	33,066	23,566	28,946	29,274	21,856

Chicken Production Timeline
Cycle de production du poulet



Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 140 eggs during their lay period. Hatcheries incubate these fertilized chicken eggs for 3 weeks producing chicks that are placed on farms of chicken producers for approximately 6 weeks before processing. Primary processing plants slaughter birds and prepare the meat for the retail and food service markets. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat.

Les reproducteurs primaires produisent des oiseaux génétiquement améliorés, qui pondent ultérieurement quelque 140 oeufs durant leur période de ponte. Les couvoirs incubent ces oeufs fertilisés de poulet pendant 3 semaines afin de produire les poussins qui seront placés dans les poulaillers des producteurs de poulet durant environ 6 semaines avant leur transformation. Les usines de transformation primaire abattent ces oiseaux et préparent la viande à l'intention des magasins de détail et des services alimentaires. Les oiseaux peuvent être vendus entiers ou en découpes, ou encore surtransformés en produits prêts à être consommés, comme des pâtés congelés, des repas congelés ou de la charcuterie.

Source : National Farm Products Council • Conseil national des produits agricoles

Chicken Production
Production de poulet
1994 - 2004

Source . 1994-1997 Agriculture and Agri-Food Canada • 1994-1997 Agriculture et Agroalimentaire Canada
1998-2004 CFC • 1998-2004 PPC

Chicken Production
Production de poulet

Prov	2004 Production (000 kg)	2003 Production (000 kg)	2004/2003 Change Changement %	2004 % Canadian Total % du total canadien %
BC	120,466	147,933	-18.6	12.7
AB	86,946	81,024	7.3	9.2
SK	33,156	30,456	8.9	3.5
MB	39,980	38,671	3.4	4.2
ON	319,760	303,134	5.5	33.8
QC	269,120	260,820	3.2	28.4
NB	26,786	25,220	6.2	2.8
NS	33,393	31,372	6.4	3.5
PE	3,578	3,343	7.0	0.4
NL	13,051	12,573	3.8	1.4
Canada	946,236	934,546	1.3	100.0
West/Ouest	280,548	934,546	-70.0	29.6
Central/Centre	588,880	563,954	4.4	62.2
East/Est	76,808	72,508	5.9	8.1

Source : CFC • PPC

Chicken Farm Cash Receipts (FCR) - 2004
Recettes monétaires agricoles (RMA) - Poulet - 2004

Prov	Chicken FCR RMA du poulet ($000)	% Canadian Total % du total canadien %	Chicken FCR as a % of Total FCR RMA du poulet en % des RMA totales %
BC	205,443	13.0	8.6
AB	138,593	8.8	1.7
SK	55,410	3.5	0.9
MB	67,144	4.3	1.7
ON	531,107	33.7	6.2
QC	447,776	28.4	7.1
NB	47,068	3.0	11.2
NS	58,228	3.7	12.9
PE and/et NL	26,937	1.7	--
Canada	1,577,706	100.0	4.3
West/Ouest	466,590	29.6	2.3
Central/Centre	978,883	62.0	6.6
East/Est	132,233	8.4	10.1

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Source : Statistics Canada • Statistique Canada

Chicken Exports / Poulet exporté

	2004		2003		
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)	
United States	132.4	28.1	101.3	22.0	États-Unis
Hong Kong	6.0	7.4	4.2	5.1	Hong Kong
Philippines	5.0	5.9	5.7	7.6	Philippines
South Africa	3.8	4.4	10.6	13.5	Afrique du Sud
Russia	2.6	4.1	5.7	8.6	Russie
Others	19.6	25.8	15.9	22.2	Autres
Total	169.4	75.7	143.4	79.0	Total

Source : Statistics Canada • Statistique Canada

Volume of Chicken Imports / Quantité de poulet importé

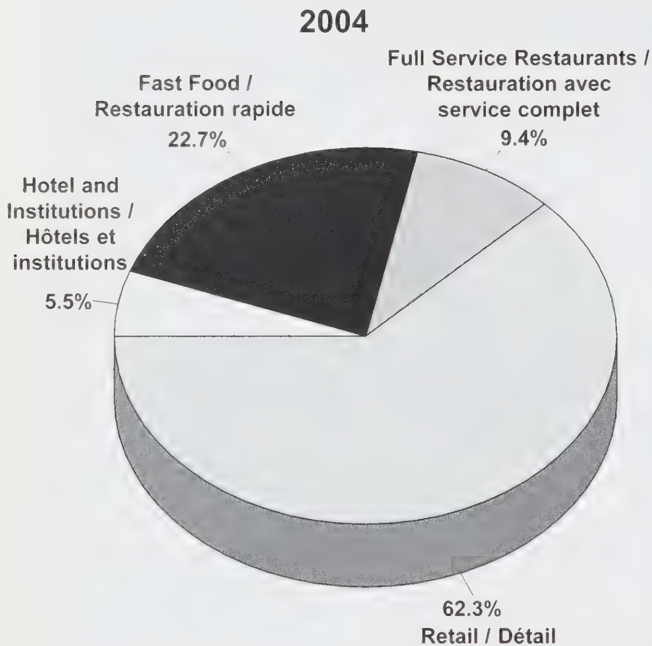
	2004	2003	2004/2003 Change Changement	
	(000 000 kg)	(000 000 kg)	%	
Whole Carcass	8.8	0.4	1861.8	Carcasses entières
Breasts	32.2	29.0	10.8	Poitrines
Wings	23.2	17.9	29.5	Ailes
Boneless Parts	9.0	5.7	57.4	Découpes désossées
Cooked	11.4	13.3	-14.3	Cuits
Others	6.4	13.7	-53.5	Autres
Further Processed	16.3	14.0	16.9	Surtransformés
Total	107.3	94.1	14.0	Total

Includes quantities imported under the import for re-export program

Inclut les quantités importées en vertu du programme d'importation pour ré-exportation

Source : Agriculture and Agri-Food Canada, actual weight • Agriculture et Agroalimentaire Canada, poids réel

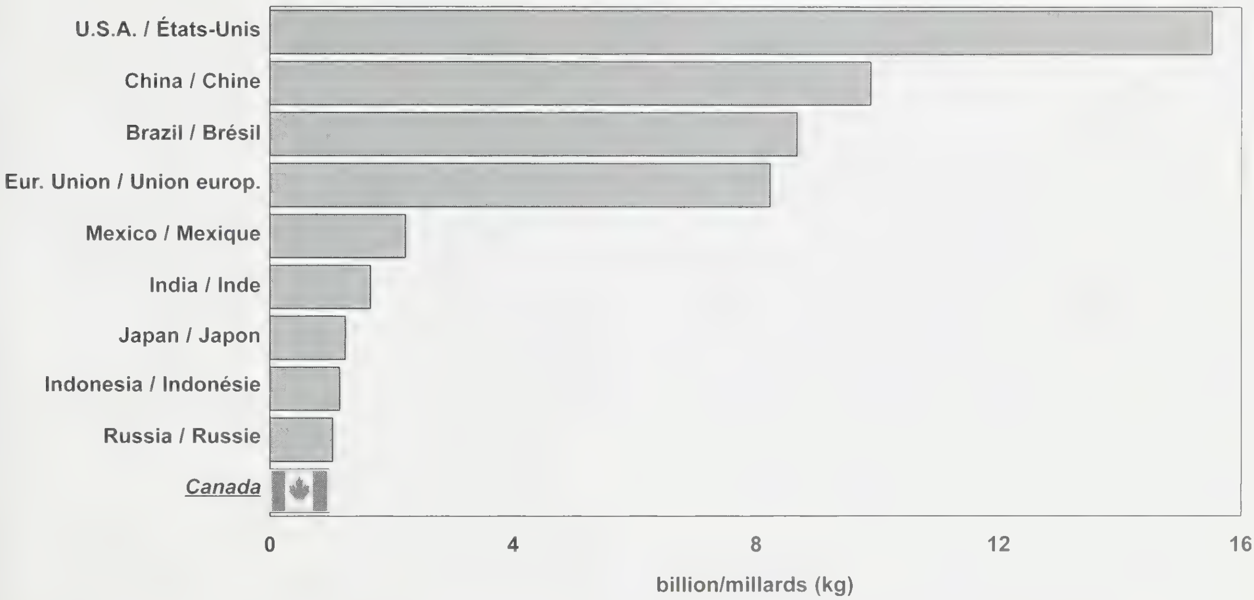
Chicken Consumption by Market Sector
Consommation de poulet par segment du marché



	2004	2003	2002	2001	2000
	(000 000 kg)				
Retail/ Détail	607	595	608	597	553
Fast Food/ Restauration rapide	221	213	211	203	193
Full Service Restaurants/ Restauration avec service complet	92	90	94	92	90
Hotel and Instutions/ Hôtels et institutions	54	53	54	54	54
Total	974	951	967	946	890

Source : Further Poultry Processors Association of Canada • Association canadienne des surtransformateurs de volailles

Major Chicken Meat Producing Countries
Principaux pays producteurs de viande de poulet
2004



Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

Turkey - 2004 Hightlights

Turkey production was affected by the AI outbreak in British Columbia where B.C.'s production fell 18.7% from 2003 (page 34). On a national basis, total production was down 2.6% as 5 provinces experienced lower production levels compared to 2003.

Imports of turkey are based on a Tariff Rate Quota (TRQ) system (page 12) with a WTO access level of 5.6 million kg on an eviscerated weight basis. In 2004, 99.9% of TRQs were utilized. Supplementary permits may be issued over and above the TRQ access level and in 2004, 1.8 million kg were imported under these permits. Meat imported for re-export, called Special Supplementary Permits, amounted to 1.5 million kg in 2004 or 16.6% of total import permits issued.

Imports (page 36) amounted to 8.9 million kg, an increased of 28.2% over 2003. Most of the increase came in as boneless breast meat, an increase of 37% over last year. All turkey meat imported originated from the U.S. These imports were valued at $32.6 million in 2004, an increase of $9.3 million or 37.9% over 2003.

The AI outbreak in B.C. and resulting export bans placed on Canada, challenged exporters. The bans caused a shifting of volumes between countries but by the end of the year, exports were up over 2003. Exports in 2004 amounted to 18.5 million kg, an increase of 12.3% from 2003 (page 36). The United States continued to be Canada's largest market for turkey in terms of dollar value and volume.

Per capita consumption has remained constant over the past several years (page 9). Recent new product offerings in the restaurant industry are viewed as a positive development with increases in disappearance expected.

Dindon - Points saillants pour 2004

La production de dindon a été affectée par la flambée de grippe aviaire en C.-B., où la production a diminué de 18,7 % par rapport à 2003 (page 34). À l'échelle nationale, la production totale a diminué de 2,6 %, les niveaux de production ayant été inférieurs à ceux de 2003 dans 5 provinces.

L'importation de dindon est contrôlée par un régime de contingents tarifaires (page 12) qui prévoit en vertu de l'ALENA un niveau d'accès de 5,6 millions kg (poids éviscéré). En 2004, 99,9 % des contingents tarifaires ont été utilisés. Outre les contingents tarifaires, l'industrie peut obtenir des licences supplémentaires. Ainsi, en 2004, l'industrie a importé 1,8 million kg grâce à ces licences. La quantité de viande importée aux fins de réexportation, c.-à-d. en vertu de licences supplémentaires spéciales, a atteint 1,5 million kg en 2004, ce qui représentait 16,6 % des importations totales autorisées par des licences.

Les importations (page 36) ont atteint 8,9 millions kg, une hausse de 28,2 % par rapport à 2003. La majeure partie de l'augmentation (37 % par rapport à l'année précédente) portait sur la viande de poitrine désossée. Toute la viande de dindon importée provenait des États-Unis. La valeur de ces importations a été de 32,6 millions $ en 2004, une augmentation de 9,3 millions $ ou de 37,9 % par rapport à 2003.

La flambée de grippe aviaire en C.-B. et les interdictions d'exportation imposées pour cette raison au Canada ont posé des problèmes aux exportateurs. Les interdictions ont causé des déplacements de quantités entre pays, mais à la fin de l'année les exportations étaient tout de même supérieures à celles de 2003. Les exportations en 2004 se sont élevées à 18,5 millions kg, une hausse de 12,3 % par rapport à 2003 (page 36). Les États-Unis sont restés le principal marché du dindon pour le Canada, tant en quantité qu'en valeur.

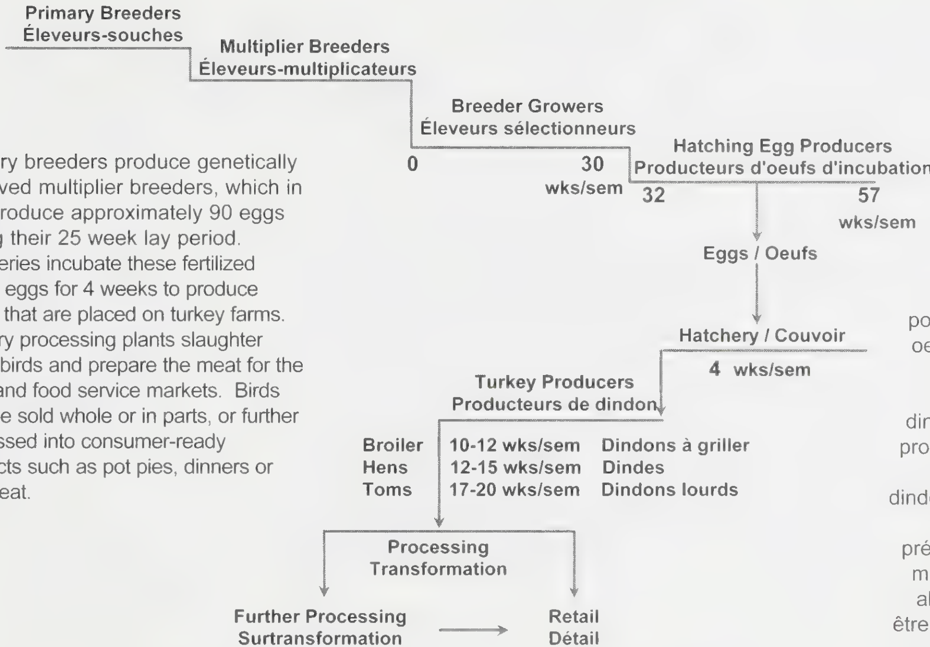
La consommation par habitant est restée constante au cours des dernières années (page 9). Les nouveaux produits récemment offerts dans l'industrie de la restauration sont considérés comme des développements positifs qui accéléreront vraisemblablement l'écoulement.

Turkey / Dindon

Highlights / Points saillants

	2004	2003	2002	2001	2000
Number of Producers Nombre de producteurs	538	550	556	542	545
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	267.6	260.7	258.8	262.6	263.3
Production (000 000 kg) Production (000 000 kg)	144.3	148.1	145.7	148.5	151.8
Per Capita Consumption (kg) Consommation par habitant (kg)	4.2	4.1	4.3	4.2	4.3
Consumer Price Index (1992=100) Indice des prix à la consommation (1992=100)	135.5	131.7	131.4	128.4	123.9
Exports ($000 000) Exportations (000 000 $)	21.6	16.8	17.1	18.2	13.2
Imports ($000 000) Importations (000 000 $)	32.6	23.3	26.5	23.8	18.7
Storage Stocks on December 31 (000 kg) Stocks en entrepôt au 31 décembre (000 kg)	11,728	15,859	13,956	19,219	14,412

Turkey Production Timeline
Cycle de production du dindon



Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 90 eggs during their 25 week lay period. Hatcheries incubate these fertilized turkey eggs for 4 weeks to produce poults that are placed on turkey farms. Primary processing plants slaughter these birds and prepare the meat for the retail and food service markets. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat.

Les reproducteurs primaires produisent des oiseaux génétiquement améliorés, qui pondent ultérieurement quelque 90 oeufs durant leur période de ponte de 25 semaines. Les couvoirs incubent ces oeufs fertilisés de dindon pendant 4 semaines afin de produire les dindonneaux qui seront placés dans les exploitations de dindon. Les usines de transformation primaire abattent ces oiseaux et préparent la viande à l'intention des magasins de détail et des services alimentaires. Les oiseaux peuvent être vendus entiers ou en découpes, ou encore surtransformés en produits prêts à être consommés, comme des pâtés congelés, des repas congelés ou de la charcuterie.

Source : National Farm Products Council • Conseil national des produits agricoles

Turkey Production
Production de dindon
1994 - 2004

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Turkey Production
Production de dindon

Prov	2004 Production (000 kg)	2003 Production (000 kg)	2004/2003 Change Changement %	2004 % Canadian Total % du total canadien %
BC	12,773	15,711	-18.7	8.9
AB	11,917	12,903	-7.6	8.3
SK	4,881	4,991	-2.2	3.4
MB	9,482	10,374	-8.6	6.6
ON	67,902	67,235	1.0	47.1
QC	31,478	30,962	1.7	21.8
NB	2,329	2,457	-5.2	1.6
NS	3,516	3,492	0.7	2.4
PE	--	--	--	--
NL	--	--	--	--
Canada	144,278	148,125	-2.6	100.0
West/Ouest	39,053	43,979	-11.2	27.1
Central/Centre	99,380	98,197	1.2	68.9
East/Est	5,845	5,949	-1.7	4.1

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Source : Agriculture and Agri-Food Canada and CTMA • Agriculture et Agroalimentaire Canada et OCCD

Turkey Farm Cash Receipts (FCR) - 2004
Recettes monétaires agricoles (RMA) - Dindon - 2004

Prov	Turkey FCR RMA du dindon ($000)	% Canadian Total % du total canadien %	Turkey FCR as a % of Total FCR RMA du dindon en % des RMA totales %
BC	22,988	8.6	1.0
AB	23,643	8.8	0.3
SK	8,853	3.3	0.1
MB	17,256	6.4	0.4
ON	126,180	47.1	1.5
QC	58,122	21.7	0.9
NB	4,068	1.5	1.0
NS	6,455	2.4	1.4
PE and/et NL	73	--	--
Canada	267,638	100.0	0.7

West/Ouest	72,740	27.2	0.4
Central/Centre	184,302	68.9	1.2
East/Est	10,596	4.0	0.8

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Source : Statistics Canada • Statistique Canada

Turkey Exports / Dindon exporté

	2004		2003		
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)	
United States	9.7	3.0	6.3	1.6	États-Unis
Russia	1.5	2.0	2.3	3.1	Russie
South Africa	1.5	1.8	2.5	4.3	Afrique du Sud
Philippines	1.2	2.3	0.5	0.9	Philippines
Bulgaria	1.0	1.4	0.4	0.5	Bulgarie
Others	6.7	8.0	4.7	6.0	Autres
Total	21.6	18.5	16.8	16.4	Total

Source : Statistics Canada • Statistique Canada

Volume of Turkey Imports / Quantité de dindon importé

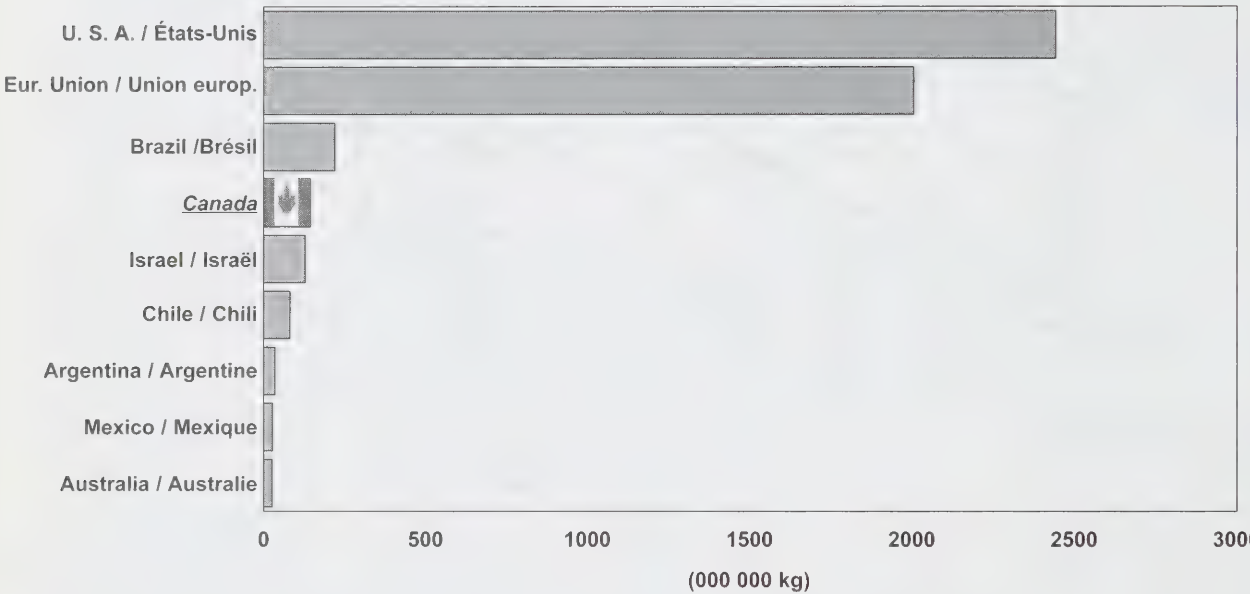
	2004	2003	2004/2003 Change Changement	
	(000 000 kg)	(000 000 kg)	%	
Live	-	-	-	Vivants
Whole Carcass	0.1	0.0	140.0	Carcasses entières
Breasts	3.3	2.4	37.7	Poitrines
Other Boneless	0.6	0.5	26.8	Autres désossés
Bone In Parts	0.0	0.1	-84.7	Découpes avec os
Cooked	0.5	0.5	2.9	Cuits
Further Processed	4.4	3.5	24.6	Surtransformés
Total	9.0	7.1	28.0	Total

Includes quantities imported under the import for re-export program

Inclut les quantités importées en vertu du programme d'importation pour ré-exportation

Source : Agriculture and Agri-Food Canada, actual weight • Agriculture et Agroalimentaire Canada, poids réel

Major Turkey Meat Producing Countries
Principaux pays producteurs de viande de dindon
2004



Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

NFPC CNPA **Notes**

CNPA NFPC **Notes**

Eggs - 2004 Highlights

The federal government ordered the depopulation of 1.4 million egg layers in the spring of 2004 due to the avian influenza outbreak in British Columbia. Of the 97 regulated egg operations in this area, 76 were depopulated. This represents approximately 60 % of B.C.'s total egg production. The depopulation had a significant impact on B.C.'s egg industry and affects much of the data reported in this handbook.

Egg production in 2004 (page 44), on a national basis, was down 4.0% from 2003. This reflected the drop in production in B.C. of almost 39% from the previous year.

The decrease in production also affected farm cash receipts, the volume of industrial product and the volume of shell egg imports into B.C.

B.C.'s farm cash receipts of $46.7 million (page 45), was down 35.1% from last year, yet on a national basis, farm cash receipts were virtually unchanged from 2003.

With the dramatic decrease in production in B.C., imports were required to supply shell eggs to B.C.'s market place. On a national basis, shell egg imports (page 47) increased 13.8 million kg, liquid equivalent, or 24 million dozen. Of this total, 18.6 million dozen entered Canada to supply the B.C. market.

Industrial product (page 48) refers to eggs that are in excess of local or provincial requirements for the table market. With the significant decrease in production in B.C., its industrial product volumes were 7.1 million dozen below 2003 volumes, a 57.9% decrease. On a national basis, industrial product dropped 10.4 million dozen, a 9.4% decrease.

Oeufs - Points saillants pour 2004

Le gouvernement fédéral a ordonné le dépeuplement de 1,4 million de pondeuses au printemps 2004 à cause d'une flambée de grippe aviaire en C.-B. Des 97 exploitations d'oeufs réglementées dans cette région, 76 ont été dépeuplées. Cela équivalait à quelque 60 % de la production totale d'oeufs de la C.-B. Le dépeuplement a eu de graves incidences sur l'industrie des oeufs en C.-B. et a affecté la majorité des données présentées dans ce recueil.

À l'échelle nationale, la production d'oeufs en 2004 (page 44) a diminué de 4,0 % par rapport à 2003. Cette situation a résulté d'une chute de pratiquement 39 % de la production par rapport à l'année précédente en C.-B.

La diminution de la production a aussi affecté les recettes agricoles, le niveau des produits industriels et la quantité d'oeufs en coquille importés en C.-B.

En C.-B., les recettes agricoles de 46,7 millions $ (page 45) ont diminué de 35,1 % par rapport à l'année précédente, tandis qu'à l'échelle nationale, elles étaient pratiquement inchangées par rapport à 2003.

Vu la brutale diminution de la production en C.-B., il a fallu recourir aux importations pour approvisionner en oeufs de consommation le marché de cette province. À l'échelle nationale, les importations d'oeufs de consommation (page 47) ont augmenté de 13,8 millions kg (équivalent liquide), ce qui correspondait à 24 millions de douzaines. De cette quantité totale, 18,6 millions de douzaines sont entrées au Canada pour approvisionner le marché de la C.-B.

Les produits industriels (page 48) désignent les oeufs excédentaires aux besoins du marché local ou provincial d'oeufs de consommation. Vu la forte diminution de la production en C.-B., les produits industriels y ont subi une baisse de 7,1 millions de douzaines par rapport à 2003, une réduction de 57,9 %. Sur la scène nationale, les produits industriels ont subi une baisse de 10,4 millions de douzaines ou 9,4 %.

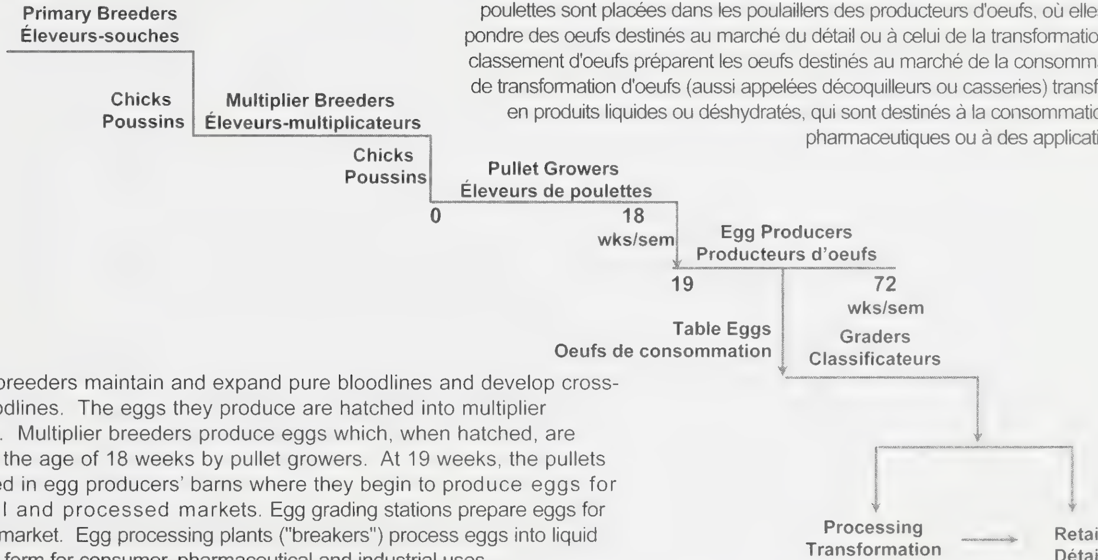
Eggs / Oeufs

Highlights / Points saillants

	2004	2003	2002	2001	2000
Number of Producers Nombre de producteurs	1,078	1,100	1,128	1,146	1,147
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	565.9	566.0	575.0	547.9	511.1
Production (000 000 dozen) Production (000 000 douzaines)	478.7	498.5	494.6	474.1	461.7
Per Capita Consumption (kg) Consommation par habitant (kg)	15.4	15.6	15.4	15.9	15.7
Consumer Price Index (1992=100) Indice des prix à la consommation (1992=100)	144.3	140.4	133.9	129.3	124.0
Exports ($000 000) Exportations (000 000 $)	40.6	42.9	41.7	30.7	26.2
Imports ($000 000) Importations (000 000 $)	59.4	37.5	31.6	30.8	26.9
Storage Stocks-Frozen and Dried egg on December 31 (converted to 000 dozens) Stocks en entrepôt - congelés et déshydratés au 31 décembre (équivalent en 000 douzaines)	12,230	8,697	10,737	9,026	7,962

Egg Production Timeline
Cycle de production d'oeufs

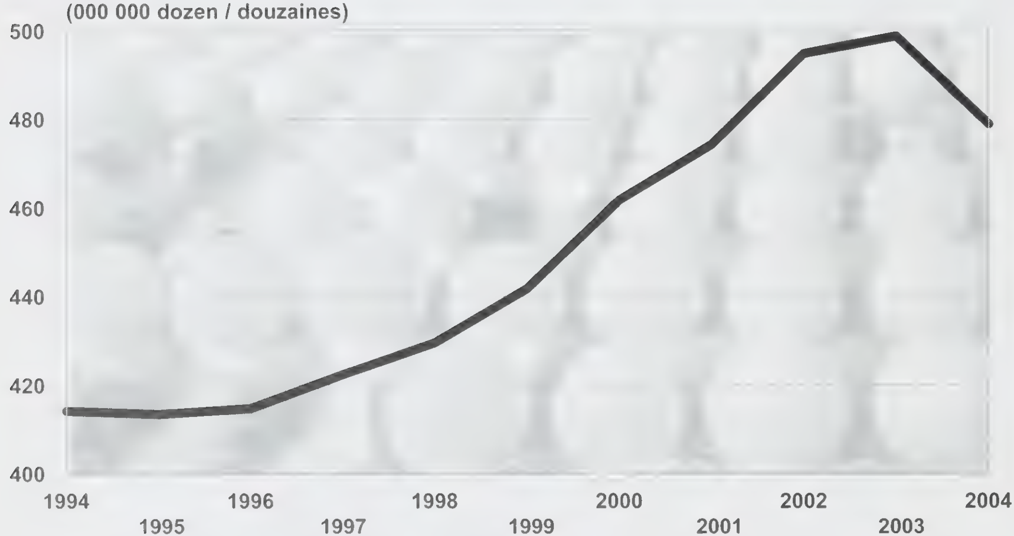
Les reproducteurs primaires maintiennent et élargissent les races pures et mettent au point des races hybrides. Ils produisent des oeufs qui seront incubés pour obtenir les reproducteurs de multiplicateurs. Ces derniers produisent les oeufs qui, une fois incubés, donneront les poussins que les éleveurs de poulettes garderont jusqu'à 18 semaines. À 19 semaines, les poulettes sont placées dans les poulaillers des producteurs d'oeufs, où elles commencent à pondre des oeufs destinés au marché du détail ou à celui de la transformation. Les postes de classement d'oeufs préparent les oeufs destinés au marché de la consommation. Les usines de transformation d'oeufs (aussi appelées décoquilleurs ou casseries) transforment les oeufs en produits liquides ou déshydratés, qui sont destinés à la consommation, à des usages pharmaceutiques ou à des applications industrielles.



Primary breeders maintain and expand pure bloodlines and develop cross-bred bloodlines. The eggs they produce are hatched into multiplier breeders. Multiplier breeders produce eggs which, when hatched, are grown to the age of 18 weeks by pullet growers. At 19 weeks, the pullets are placed in egg producers' barns where they begin to produce eggs for the retail and processed markets. Egg grading stations prepare eggs for the table market. Egg processing plants ("breakers") process eggs into liquid and dried form for consumer, pharmaceutical and industrial uses.

Source : National Farm Products Council • Conseil national des produits agricoles

Egg Production
Production d'oeufs
1994 - 2004



Source : CEMA • OCCO

Egg Production
Production d'oeufs

Prov	2004 Production (000 dozens) (000 douzaines)	2003 Production (000 dozens) (000 douzaines)	2004/2003 Change Changement %	2004 % Canadian Total % du total canadien %
BC	37,227	60,706	-38.7	7.8
AB	40,659	39,356	3.3	8.5
NT	1,589	2,041	-22.2	0.3
SK	20,370	19,524	4.3	4.3
MB	54,023	54,316	-0.5	11.3
ON	189,685	187,152	1.4	39.6
QC	95,037	95,360	-0.3	19.9
NB	10,709	10,779	-0.7	2.2
NS	17,847	17,591	1.5	3.7
PE	3,146	3,148	-0.1	0.7
NL	8,418	8,493	-0.9	1.8
Canada	478,709	498,466	-4.0	100.0

West/Ouest	153,867	175,943	-12.5	32.1
Central/Centre	284,722	282,512	0.8	59.5
East/Est	40,120	40,011	0.3	8.4

Source : CEMA • OCCO

Egg Farm Cash Receipts (FCR) - 2004
Recettes monétaires agricoles (RMA) - Oeufs - 2004

Prov	Egg FCR RMA des oeufs ($000)		% Canadian Total % du total canadien %	Egg FCR as a % of Total FCR RMA des oeufs en % des RMA totales %
BC	46,699		8.3	1.9
AB	45,938		8.1	0.6
SK	22,627		4.0	0.4
MB	65,555		11.6	1.7
ON	221,952		39.2	2.6
QC	102,632		18.1	1.6
NB	17,164		3.0	4.1
NS	25,988		4.6	5.8
PE	4,121		0.7	1.2
NL	13,265		2.3	15.4
Canada	565,941	*	100.0	1.5
West/Ouest	180,819		32.0	0.9
Central/Centre	324,584		57.4	2.2
East/Est	60,538		10.7	4.6

Note : Statistics Canada does not publish FCR for NT. • Statistique Canada ne publie pas les recettes agricoles des T.N.-O

* includes $15.3 million for hatching eggs • inclut 15,3 millions $ pour les oeufs d'incubation

Source : Statistics Canada • Statistique Canada

Produits d’oeufs exportés - par catégorie

	2004		2003		
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)	
Whole Egg					**Oeufs entiers**
Liquid/Frozen	1.3	0.7	1.8	1.1	**Liquides ou surgelés**
Dried	5.3	1.2	7.4	1.3	**Déshydratés**
Egg Albumen					**Albumen**
Liquid/Frozen	7.0	3.9	2.0	1.7	**Liquide ou surgelé**
Dried	16.8	2.3	17.1	2.0	**Déshydraté**
Egg Yolks					**Jaunes d’oeufs**
Liquid/Frozen	2.8	1.3	7.2	2.8	**Liquides ou surgelés**
Dried	7.5	2.0	7.4	1.7	**Déshydratés**
Total	40.6	11.4	42.9	10.6	**Total**

Note : Exports of shell eggs are minimal • Les exportations d'oeufs en coquille sont minimes

Source : Statistics Canada • Statistique Canada

Produits d'oeufs exportés - par pays

Destination	2004		2003		**Destination**
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)	
United States	23.3	6.6	12.9	5.3	**Japon**
Japan	9.7	2.5	22.1	3.6	**États-Unis**
Venezuela	2.3	1.0	0.9	0.4	**Vénézuela**
Others	5.3	1.4	7.0	1.3	**Autres**
Total	40.6	11.4	42.9	10.6	**Total**

Source : Statistics Canada • Statistique Canada

Egg Imports
Importations d'oeufs

	2004 (000 000) ($)	2004 (000 000) (kg)	2003 (000 000) ($)	2003 (000 000) (kg)	
Whole Egg					**Oeufs entiers**
Liquid/Frozen	2.9	2.4	1.2	0.8	**Liquides ou surgelés**
Dried	2.3	1.2	1.8	1.1	**Déshydratés**
Egg Albumen					**Albumen**
Liquid/Frozen	6.2	5.1	6.4	7.2	**Liquide ou surgelé**
Dried	0.9	0.1	1.6	0.2	**Déshydraté**
Egg Yolks					**Jaunes d'oeufs**
Liquid/Frozen	3.6	2.4	3.8	1.8	**Liquides ou surgelés**
Dried	0.2	0.0	0.3	0.1	**Déshydratés**
Further Processed Eggs	5.7	2.2	3.1	1.3	**Oeufs surtransformés**
Shell Eggs (liquid equivalent)	37.6	23.2	19.3	9.4	**Oeufs en coquille (équivalent liquide)**
Total (liquid equivalent)	59.4	36.6	37.5	21.8	**Total** (équivalent liquide)

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Industrial Product Volumes
Quantité de produits industriels

Prov	2004 (000 dozens) (000 douzaines)	2003 (000 dozens) (000 douzaines)	2004/2003 Change Changement (%)
BC	5,141	12,207	-57.9
AB	8,076	6,752	19.6
NT	1,531	1,980	-22.7
SK	3,559	3,073	15.8
MB	22,206	25,738	-13.7
ON	35,513	34,284	3.6
QC	10,644	12,889	-17.4
NB	2,734	3,284	-16.8
NS	5,950	5,478	8.6
PE	1,546	1,519	1.8
NL	3,612	3,753	-3.8
Canada	100,511	110,958	-9.4

Source : CEMA • OCCO

Processed Egg Production
Production d'oeufs de transformation
(000 kg - liquid equivalent / équivalent liquide)

	2004	2003	2002	2001	2000	
Whole Egg	39.9	40.2	38.1	35.5	38.5	**Oeufs entiers**
Yolk	11.2	12.4	15.6	13.5	12.1	**Jaune**
Albumen	21.9	23.9	29.3	24.9	22.5	**Albumen**
Total	73.0	76.5	83.0	73.9	73.1	**Total**

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Eggs Broken for Processing
Oeufs cassés destinés à la transformation
(000 dozens / douzaines)

	2004	2003	2002	2001	2000	
Eggs	144,952	143,222	160,151	143,697	134,664	**Oeufs**

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

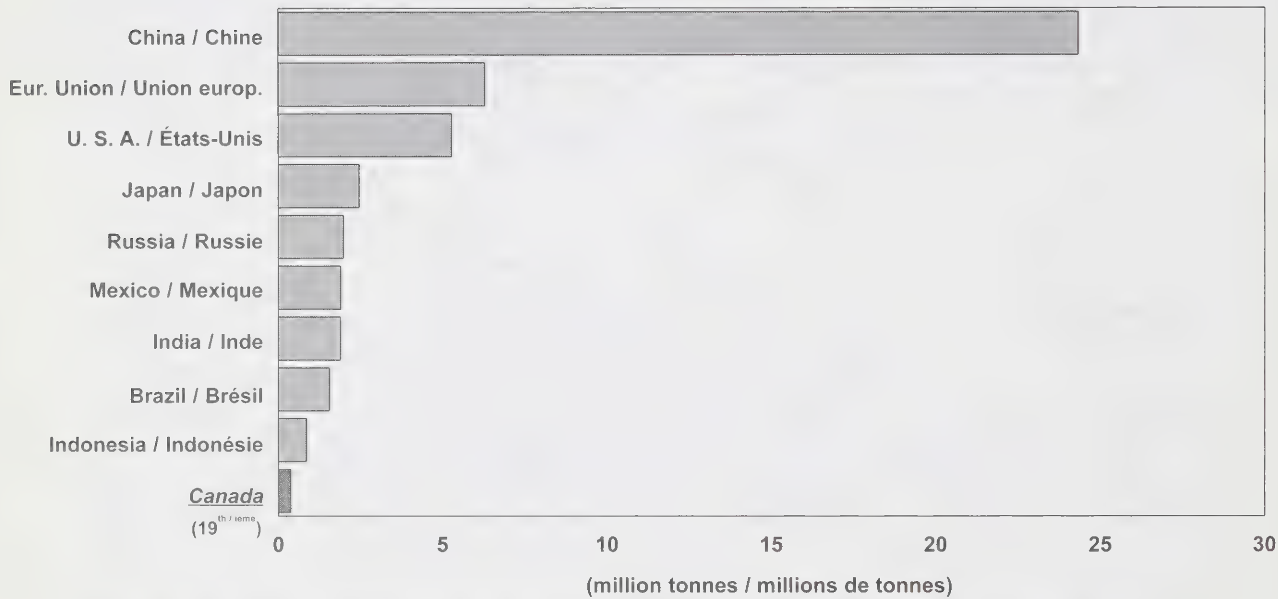
Per Capita Consumption of Shell and Processed Eggs
Consommation par personne - Oeufs en coquille et transformés

(dozens per person / douzaines par personne)

	2004	2003	2002	2001	2000	
Processed Egg	3.6	3.8	3.9	3.7	3.8	**Oeufs transformés**
Shell Egg	11.8	11.8	11.5	12.2	11.9	**Oeufs en coquille**
Total Domestic Consumption	15.4	15.6	15.4	15.9	15.7	**Production intérieure totale**

Source : Statistics Canada and CEMA • Statistique Canada et OCCO

Major Egg Producing Countries
Principaux pays producteurs d'oeufs
2004



Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

Industry Contacts / Points de contact

Canadian Egg Marketing Agency
Office canadien de commercialisation des oeufs
1501 - 112, rue Kent Street
Ottawa, Ontario K1P 5P2
Tel./Tél. : (613) 238-2514
Fax/Téléc. : (613) 238-1967
www.canadaegg.ca
Contact : Tim Lambert, Executive Director / directeur exécutif

Canadian Turkey Marketing Agency
Office canadien de commercialisation du dindon
202 - 7145, avenue West Credit Avenue
Building 1, édifice 1
Mississauga, Ontario
L5N 6J7
Tel./Tél. : (905) 812-3140
Fax/Téléc. : (905) 812-9326
www.canadianturkey.ca
Contact : Phil Boyd, Executive Director / directeur exécutif

Chicken Farmers of Canada
Producteurs de poulet du Canada
1007 - 350, rue Sparks Street
Ottawa, Ontario K1R 7S8
Tel./Tél. : (613) 241-2800
Fax/Téléc. : (613) 241-5999
www.chicken.ca
Contact : Mike Dungate, General Manager / directeur général

Canadian Broiler Hatching Egg Marketing Agency
Office canadien de commercialisation des oeufs d'incubation de poulet à chair
1101 - 75, rue Albert Street
Ottawa, Ontario K1P 5E7
Tel./Tél. : (613) 232-3023
Fax/Téléc. : (613) 232-5241
www.cbhema.com
Contact : Errol Halkai, General Manager / directeur général

Canadian Poultry and Egg Processors Council
Conseil canadien des transformateurs d'oeufs et de volailles
400 - 1545, avenue Carling Avenue
Ottawa, Ontario
K1Z 8P9
Tel./Tél. : (613) 724-6605
Fax/Téléc. : (613) 724-4577
www.cpepc.ca
Contact : Robin Horel, President and CEO / président et chef de la direction

Further Poultry Processors Association of Canada
Association canadienne des surtransformateurs de volailles
203 - 2525, boulevard St. Laurent Blvd
Ottawa, Ontario
K1H 8P5
Tel./Tél. : (613) 738-1175
Fax/Téléc. : (613) 733-9501
www3.sympatico.ca/fppac
Contact : Robert DeValk, General Manager / directeur général

fppac

www.nfpc-cnpa.gc.ca

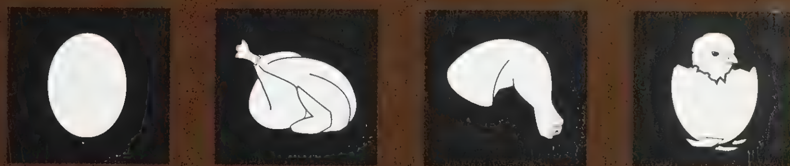
National Farm Products Council

Conseil national des produits agricoles

Poultry and Egg Industry

(data 2005)

2006



ndustrie de la volaille et des oeufs

(données de 2005)

Canada

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Introduction

Welcome to the 2006 edition of the National Farm Products Council's (NFPC) Poultry and Egg Industry handbook. This reference guide uses 2005 data obtained from industry and government relating to the poultry meat and egg industry.

Canada's poultry and egg industry operates within an orderly marketing framework called supply management. There are four national marketing agencies - the Canadian Egg Marketing Agency (CEMA) established in 1972, the Canadian Turkey Marketing Agency (CTMA) established in 1974, the Chicken Farmers of Canada (CFC) established in 1978 and the Canadian Broiler Hatching Egg Marketing Agency (CBHEMA) established in 1986.

The NFPC oversees the operations of the four marketing agencies, reviews orders and regulations made by the agencies and considers complaints brought against agency decisions.

The NFPC also works closely with provincial and territorial government agencies that are responsible for supervising commodity boards at the provincial level. The NFPC along with its provincial and territorial counterparts have established the National Association of Agri-Food Supervisory Agencies as a forum to discuss issues of common interest.

Introduction

Le Conseil national des produits agricoles (CNPA) vous présente la version 2006 de son Recueil de données pour l'industrie de la volaille et des oeufs. Ce guide de référence utilise les données recueillies pour 2005 auprès de l'industrie et du gouvernement concernant l'industrie de la viande de volaille et des oeufs.

L'industrie canadienne de la volaille et des oeufs opère dans un cadre de commercialisation réglementée appelé <<gestion de l'offre>>. Elle dispose de quatre offices canadiens de commercialisation : l'Office canadien de commercialisation des oeufs (OCCO) établi en 1972, l'Office canadien de commercialisation du dindon (OCCD) établi en 1974, les Producteurs de poulet du Canada (PPC) établis en 1978 et l'Office canadien de commercialisation des oeufs d'incubation de poulet à chair (OCCOIPC) établi en 1986.

Le CNPA supervise les activités des offices canadiens de commercialisation, examine les ordonnances et règlements pris par ces offices et instruit les plaintes déposées à la suite de décisions prises par ces mêmes offices.

En outre, le CNPA travaille en étroite collaboration avec les organismes établis par les gouvernements provinciaux et territoriaux pour superviser les activités de leurs propres offices de commercialisation. De concert avec ses homologues provinciaux et territoriaux, le CNPA a établi l'Association nationale des régies agroalimentaires, qui constitue un forum où les offices canadiens peuvent discuter de questions d'intérêt mutuel.

Canada's Poultry and Egg Industry - At a glance

In 2005, there were 4,668 poultry and egg producers in Canada (page 4), producing just over 1.1 billion kg of chicken and turkey meat and over 517 million dozen eggs (page 6). In addition to the producers, there are 70 federally registered poultry hatcheries, 380 federally registered processing establishments, 31 egg stock hatcheries, 279 egg grading stations and 17 egg processing plants (page 5).

Poultry and egg farm cash receipts (page 7) totaled $2.6 billion, making up 7.1% of total agricultural receipts. This is up marginally over 2004. Farm cash receipts measure the gross revenue of farm businesses in current dollars. They include sales of crops and livestock products (except sales between farms in the same province) and program payments. Receipts are recorded when the money is paid to farmers before any expenses are paid.

Poultry and egg exports (page 8) were valued at $244 million in 2005, up 5.3% from 2004 and 35% from five years ago. Chicken made up 76% of total value of exports, while eggs and turkey both made up 12%. Most egg exports are not "in the shell", but consist of liquid and dried products.

There is an import for re-export program for poultry meat and eggs, under which these products can be imported into Canada for processing into value-added products. These products must subsequently be re-exported. The exports shown on page 8 include poultry meat and egg products of both domestic and foreign origin.

Imports of poultry and eggs, including hatching eggs, (page 8) were valued at $464 million in 2005, down 16.9% from 2004. Imports were unusually high in 2004 as additional product was required to supply the domestic market as a result of the avian influenza outbreak in British Columbia in early 2004. Chicken made up 75% of the total imports, while turkey accounted for 10%, hatching eggs (both broiler and turkey) 8% and eggs and egg products 7%.

Import permits for poultry and eggs are administered by the Department of Foreign Affairs and International Trade under a Tariff Rate Quota (TRQ) system. For each commodity, a level of within-quota access is established according to commitments made under multi-lateral and bi-lateral trade agreements. This product may enter at a zero or minimal tariff rate, depending on the agreement. See page 11 for a detailed breakdown of TRQs.

Per capita consumption (page 9) was 30.7 kilograms for chicken and 4.3 kilograms for turkey. Egg consumption remains stable at 15.6 dozens per person.

L'industrie canadienne de la volaille et des oeufs - Coup d'oeil

En 2005, le Canada comptait 4 668 producteurs de volaille et d'oeufs (page 4), qui ont commercialisé un peu plus de 1,1 milliard de kg de viande de poulet et de dindon et plus de 517 millions de douzaines d'oeufs (page 6). Ces producteurs étaient épaulés par 70 couvoirs enregistrés au fédéral, 380 établissements de transformation primaire enregistrés au fédéral, 31 couvoirs faisant l'incubation d'oeufs de type ponte, 279 postes de classement d'oeufs et 17 usines de transformation d'oeufs (page 5).

Les recettes agricoles tirées de la volaille et des oeufs (page 7) se sont élevées à 2,6 milliards de dollars, constituant 7,1 % des recettes agricoles totales. Il s'agissait d'une légère hausse par rapport à 2004. Les recettes agricoles fournissent une mesure des recettes brutes des exploitations agricoles en dollars constants. Elles comprennent les ventes de récoltes et de produits des troupeaux (sauf les ventes entre exploitations agricoles d'une même province) et les paiements reçus dans le cadre d'un programme. Les recettes sont enregistrés avant déduction des dépenses.

Les exportations de volaille et d'oeufs (page 8) ont été estimées à 244 millions de dollars en 2005, une hausse de 5,3 % par rapport à 2004 et de 35 % durant les cinq dernières années. Le poulet a constitué 76 % des exportations totales, alors que les oeufs et le dindon ont tous deux représenté 12 %. En majorité, les oeufs sont exportés non pas « en coquille », mais plutôt sous forme liquide ou déshydratée.

Il existe un programme d'importation de viande de volaille et d'oeufs aux fins de réexportation, en vertu desquels ces produits peuvent être importés au Canada pour transformation en produits à valeur ajoutée. Ces produits doivent ultérieurement être réexportés. Les exportations indiquées à la page 8 comprennent les produits à base de viande de volaille et d'oeufs produits au Canada et à l'étranger.

Les importations de volaille et d'oeufs, y compris les oeufs d'incubation (page 8) se sont élevées à 464 millions de dollars en 2005, une baisse de 16,9 % par rapport à 2004. Les importations ont été extrêmement élevées en 2004 en raison des quantités supplémentaires requises pour approvisionner le marché intérieur à la suite de la flambée de grippe aviaire en Colombie-Britannique au début de 2004. Le poulet a constitué 75 % des importations totales, le dindon 10 %, les oeufs d'incubation (de poulet à chair et de dindon) 8 %, et les oeufs et les produits des oeufs 7 %.

Les licences d'importation pour la volaille et les oeufs sont octroyées par le ministère des Affaires étrangères et du Commerce international dans le cadre d'un régime de contingents tarifaires. Pour chaque denrée, un niveau d'accès ne dépassant pas le contingent tarifaire est établi en fonction des engagements pris en vertu des accords commerciaux multilatéraux et bilatéraux. Les produits ainsi désignés peuvent être importés à un tarif zéro ou minime, selon l'accord. Pour une ventilation des contingents tarifaires, consulter la page 11.

La consommation par personne (page 9) s'est élevée à 30.7 kilogrammes pour le poulet et à 4,3 kilogrammes pour le dindon. La consommation d'oeufs est restée stable à 15,6 douzaines par personne.

Number of Poultry and Egg Producers - 2005
Nombre de producteurs de volaille et d'oeufs - 2005

Prov	Chicken Poulet	Turkey Dindon	Eggs Oeufs	Broiler Hatching Eggs Oeufs d'incubation de poulet à chair	Total
BC	337	49	125	60	571
AB	285	51	167	35	538
NT	-	-	2	-	2
SK	92	15	64	11	182
MB	118	65	168	29	380
ON	1,079	182	375	83	1,719
QC	740	139	105	46	1,030
NB	36	18	17	4	75
NS	85	24	23	2	134
PE	7	-	12	-	19
NL	7	-	11	-	18
Canada	2,786	543	1,069	270	4,668

Source: 4 national marketing agencies • les quatre offices canadiens de commercialisation.

Hatcheries, Processing Plants and Grading Stations
Couvoirs, usines de transformation et postes de classement

	Poultry/Volaille		Eggs/Oeufs		
Prov	Hatcheries Couvoirs	Processing Plants Établissements de transformation	Egg Stock Hatcheries Couvoirs de type ponte	Grading Stations Postes de classement	Egg Processing Transformation d'oeufs
BC	8	32	2	33	1
AB	8	36	7	48	2
NT and/et /YT	0	0	0	2	0
SK	4	4	2	19	0
MB	8	11	3	30	2
ON	21	147	8	74	9
QC	15	136	5	33	3
NB	2	6	3	14	0
NS	3	6	1	15	0
PE	0	1	0	5	0
NL	1	1	0	6	0
Canada	70	380	31	279	17

All of the above establishments are federally registered facilities. • Tous les établissements ci-dessus sont enregistrés au fédéral

Source: Agriculture and Agri-Food Canada, National Farm Products Council

: Agriculture et Agroalimentaire Canada, Conseil national des produits agricoles

Production by Province and Territory - 2005
Production par province et territoire - 2005

Prov	Chicken Poulet (000) kg	Turkey Dindon (000) kg	Eggs Oeufs (000) (dozen/douzaines)	Broiler Hatching Eggs Oeufs d'incubation de poulet à chair (000) (eggs/oeufs)
BC	154,453	19,543	52,203	89,275
AB	86,839	12,875	43,407	75,277
NT	-	-	1,542	-
SK	32,525	4,419	21,787	25,426
MB	40,463	10,515	56,503	32,415
ON	325,143	69,738	201,793	207,473
QC	264,936	31,508	99,654	187,521
NB	26,754	2,693	10,662	57,833 *
NS	33,311	3,539	18,391	*
PE	3,656	-	3,021	-
NL	13,195	-	8,419	-
Canada	981,275	154,830	517,381	675,220

* For broiler hatching eggs, production for NB and NS is shown under NB

* Pour les oeufs d'incubation de poulet à chair, la production de la N.-É. est regroupée avec celle du N.-B.

Source: 4 national marketing agencies • les quatre offices canadiens de commercialisation.

Farm Cash Receipts (FCR) - 2005
Recettes monétaires agricoles (RMA) - 2005

($000 000)

Prov	Chicken / Poulet	Eggs / Oeufs	Turkey / Dindon	Broiler Hatching Eggs / Oeufs d'incubation de poulet à chair	Total	Poultry and Egg as a % of Total FCR / Volaille et oeufs en % des RMA totales
BC	273.1	56.9	33.7	26.7	390.4	16.2
AB	141.9	43.1	24.3	23.0	232.4	2.9
SK	49.2	22.7	8.1	7.8	87.8	1.4
MB	66.7	60.7	18.1	9.9	155.3	4.1
ON	526.2	207.4	121.6	55.5	910.6	10.1
QC	427.4	94.5	55.0	50.0	626.9	10.1
NB	45.8	17.1	4.5	15.5 *	x	N/A
NS	55.9	27.2	6.1	*	x	N/A
PE	x	4.1	x	x	x	N/A
NL	x	13.4	x	x	x	N/A
Canada	1,614.9	547.1 **	271.4	188.3	2,621.7	7.1

* combined due to confidentiality • chiffres regroupés pour en protéger la confidentialité

x - confidential • confidentiel

** includes $13.0 million for hatching eggs • inclut 13.0 millions $ pour les oeufs d'incubation

Note : Statistics Canada does not publish FCR for the NT. • Remarque : Statistique Canada ne publie pas les RMA des T.N.-O.

Source : Statistics Canada except for Hatching Eggs where FCR are calculated by CBHEMA

: Statistique Canada, sauf pour le segment des oeufs d'incubation de poulet à chair dont les chiffres proviennent de l'OCCOIPC.

Value of Exports and Imports
Valeur des exportations et des importations

($000 000)

	Chicken Poulet		Turkey Dindon		Eggs and Egg Products Oeufs et produits d'oeufs		Broiler Hatching Eggs & Chicks Oeufs d'incubation de poulets de chair et poussins de type chair	Turkey Hatching Eggs & Poults Oeufs d'incubation de dindon et dindonneaux
	Exports Export.	Imports Import.	Exports Export.	Imports Import.	Exports Export.	Imports Import.	Imports Import.	Imports Import.
2005	183.7	345.6	30.1	44.7	30.1	35.0	29.8	8.7
2004	169.4	423.6	21.6	32.6	40.7	59.4	32.1	10.2
2003	143.4	335.9	16.8	23.3	42.9	37.5	25.0	6.1
2002	151.6	353.5	17.1	26.5	41.7	31.6	35.1	7.9
2001	131.7	341.4	18.2	23.8	30.7	30.8	36.3	10.2

Note. Exports for both broiler and turkey hatching eggs are minimal • Note: Les exportations d'œufs d'incubation (poulet à chair et dindons) sont minimes.

Source: Statistics Canada • Statistique Canada

Per Capita Consumption
Consommation par personne

	Chicken Poulet (kg)	Turkey Dindon (kg)	Beef Boeuf (kg)	Pork Porc (kg)	Table Eggs & Egg Products Oeufs de consommation et produits d'oeufs (dozens/douzaines)
2005	30.7	4.3	31.9	22.9	15.6
2004	30.4	4.2	30.7	26.7	15.3
2003	30.1	4.1	31.8	25.1	15.6
2002	30.7	4.3	30.5	27.8	15.4
2001	30.5	4.2	30.7	28.9	15.9

Source : Statistics Canada • Statistique Canada

Consumer Price Index (1992=100)
Indice des prix à la consommation (1992=100)

	Chicken Poulet	Turkey Dindon	Eggs Oeufs	Beef Boeuf	Pork Porc	All Foods Tous les aliments
2005	133.3	142.7	146.1	141.0	126.4	128.0
2004	133.1	135.5	144.3	138.4	125.7	124.9
2003	123.6	131.7	140.4	133.8	118.9	122.4
2002	116.7	131.4	133.9	132.8	118.8	120.3
2001	116.2	128.4	129.3	128.2	122.4	117.2

Source : Statistics Canada • Statistique Canada

Statistics Canada defines the Consumer Price Index (CPI) as an indicator of the changes in consumer prices experienced by Canadians. It is obtained by comparing, through time, the cost of a fixed basket of commodities purchased by Canadian consumers in a particular year. For example, the price for all foods in 2005 was 28.0% higher than it was in 1992.

Statistique Canada définit l'indice des prix à la consommation (IPC) comme un indicateur des changements dans les prix à la consommation payés par les Canadiens. Pour obtenir ces changements, on compare, durant certaines périodes de temps, le coût que doivent verser les consommateurs canadiens pour un même panier de marchandises. Par exemple, comme l'indique la page 10, le prix pour tous les aliments en 2005 était de 28,0 % supérieur à celui de 1992.

Tariff Rate Quotas (TRQs)
Contingents tarifaires

PRODUCT	WTO Agreement Accord OMC	NAFTA ALENA	2005 TRQ Contingent tarifaire 2005	PRODUIT
Hatching Eggs and Chicks	**95.4** Million eggs / millions d'oeufs	**21.1%** of anticipated current year's production / de la production prévue pour l'année en cours	**142.1** Egg equivalent, Millions / équivalent oeufs, millions	Oeufs d'incubation et poussins
Chicken	**39.9** Million Kgs eviscerated / millions de kg éviscéré	**7.5%** of previous year's production / de la production de l'année précédente	**72.5** Million Kgs eviscerated / millions de kg éviscéré	Poulet
Turkey	**5.6** Million Kgs eviscerated / millions de kg éviscéré	**3.5%** of anticipated current year's production / de la production prévue pour l'année en cours	**5.6** Million Kgs eviscerated / millions de kg éviscéré	Dindon
Egg and Egg products	**21.4** Million Dozens / millions de douzaines	**2.988%** of previous year's production / de la production de l'année précédente	**21.4** Million Dozen / millions de douzaines	Oeufs et produits d'oeufs

Source: Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Broiler Hatching Eggs - 2005 Hightlights

The effect of the outbreak of avian influenza (AI) in British Columbia in 2004 continued to have an impact on broiler hatching egg production in 2005. It was not until early August that British Columbia got up to full production capacity. Production in 2005 was further affected by limited chicken meat export opportunities due to AI outbreaks in Asia, Middle East and Eastern Europe. As a result, there was a lower hatching egg demand in Canada in 2005.

In 2005, hatching egg production (page 15) totaled 675.2 million eggs, an increase of 2.0% over 2004 with British Columbia's showing the largest gain at 35.5%. While Canada's production is up marginally, it is still below the production levels of 2003, 2002 and 2001.

Production in Ontario was down 6.2% from 2004. However, in 2004 Ontario increased its production levels because import quota was transferred to British Columbia to help out during the AI outbreak. As a consequence of this, Ontario shows a 55.2% increase over 2004 in imports of hatching eggs and chicks (page 17). All other provinces show an overall decrease of 2.8% in imports from 2004.

Oeufs d'incubation de poulet à chair - Points saillants pour 2005

La flambée de la grippe aviaire qui a sévi en Colombie-Britannique, en 2004, a continué de se répercuter sur la production d'oeufs d'incubation de poulet à chair en 2005. La production n'est revenue à la normale qu'au début du mois d'août en Colombie-Britannique. La production de 2005 a été de surcroît affectée par une restriction des possibilités d'exportation de viande de poulet en raison des foyers d'IA en Asie, au Moyen-Orient et en Europe de l'Est. En conséquence, la demande d'oeufs d'incubation a légèrement faibli au Canada en 2005.

En 2005, la production d'oeufs d'incubation (page 15) a été de 675,2 millions d'oeufs, soit une augmentation de 2,0 % par rapport à 2004. La Colombie-Britannique a obtenu le meilleur gain, avec une augmentation de 35,5 %. Bien que la production du Canada ait légèrement augmenté, elle se situe encore sous les niveaux de production de 2003, 2002 et 2001.

En Ontario, on a observé une baisse de la production de 6,2 % par rapport à 2004. Cependant, les niveaux de production de 2004 ont augmenté en Ontario en raison des quotas d'importation de cette province transférés à la Colombie-Britannique, afin d'aider celle-ci lors de la crise de la grippe aviaire. En conséquence, les chiffres de l'Ontario indiquent une augmentation de 55,2 % par rapport à 2004 en ce qui concerne l'importation des oeufs d'incubation et des poussins (page 17). Toutes les autres provinces ont subi une diminution des importations de 2,8 % par rapport à 2004.

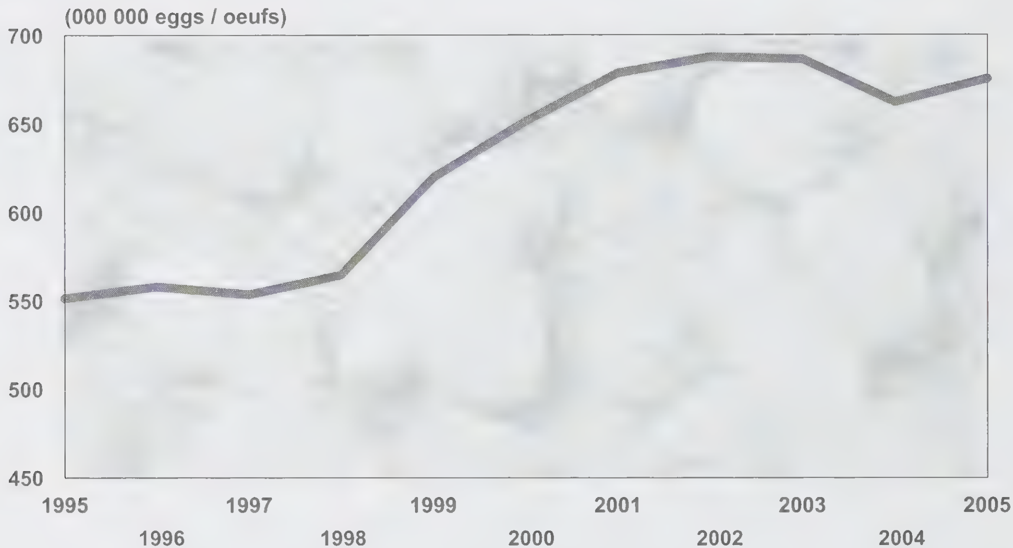
Broiler Hatching Eggs / Oeufs d'incubation de poulet à chair

Highlights / Points saillants

	2005	2004	2003	2002	2001
Number of Producers Nombre de producteurs	270	276	281	291	300
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	188.3	198.7	205.7	206.5	205.2
Production (000 000 eggs) Production (000 000 oeufs)	675.2	662.1	686.2	687.4	678.4
Imports - Broiler Hatching Eggs and Chicks ($000 000) Importations - Oeufs d'incubation de poulets de chair et poussins de type chair (000 000 $)	29.8	32.1	25.0	35.1	36.3
Imports - Turkey Hatching Eggs and Poults ($000 000) Importations - Oeufs d'incubation de dindon et dindonneaux (000 000 $)	8.7	10.2	6.1	7.9	10.2

Broiler Hatching Egg Production
Production d'oeufs d'incubation de poulet à chair

1995 - 2005



Source . CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Broiler Hatching Egg Production
Production d'oeufs d'incubation de poulet à chair

Prov	2005 Production (000) (eggs/oeufs)	2004 Production (000) (eggs/oeufs)	2005/2004 Change Changement %	2005 % Canadian Total % du total canadien %
BC	89,275	65,896	35.5	13.2
AB	75,277	76,296	-1.3	11.1
SK	25,426	22,540	12.8	3.8
MB	32,415	31,161	4.0	4.8
ON	207,473	221,225	-6.2	30.7
QC	187,521	185,804	0.9	27.8
NB and/et NS *	57,833	59,148	-2.2	8.6
Canada	675,220	662,070	2.0	100.0
West/Ouest	222,393	195,893	13.5	32.9
Central/Centre	394,994	407,028	-3.0	58.5
East/Est	57,833	59,148	-2.2	8.6

* combined due to confidentiality • chiffres regroupés pour confidentialité

Source : CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Broiler Hatching Egg Farm Cash Receipts (FCR) - 2005
Recettes monétaires agricoles (RMA) - Oeufs d'incubation de poulet à chair - 2005

Prov	Broiler Hatching Egg FCR RMA des oeufs d'incubation de poulet à chair ($000)	% Canadian Total % du total canadien %	Broiler Hatching Egg FCR as a % of Total FCR RMA des oeufs d'incubation de poulet à chair en % des RMA totales %
BC	26,684	14.2	1.1
AB	23,031	12.2	0.3
SK	7,774	4.1	0.1
MB	9,870	5.2	0.3
ON	55,475	29.5	0.6
QC	50,036	26.6	0.8
NB and/et NS *	15,474	8.2	1.8
Canada	188,344	100.0	0.5

West/Ouest	67,359	35.8	0.3
Central/Centre	105,511	56.0	0.7
East/Est	15,474	8.2	1.8

* combined due to confidentiality • chiffres regroupés pour confidentialité

Source : Estimated by CBHEMA • estimé par l'OCCOIPC

Imports of Broiler Hatching Eggs and Chicks *
Importations d'oeufs d'incubation de poulets de chair et poussins de type chair *

Prov	2005 (000) (eggs/oeufs)	2004 (000) (eggs/oeufs)	2005/2004 Change Changement %
BC	45,888	50,657	-9.4
AB	3,334	7,966	-58.2
SK	3,353	4,845	-30.8
MB	6,583	7,383	-10.8
ON	38,184	24,596	55.2
QC	37,775	42,540	-11.2
NB and/et NS **	2,942	4,086	-28.0
Canada	138,059	142,074	-2.8

West/Ouest	59,158	70,851	-16.5
Central/Centre	75,959	67,136	13.1
East/Est	2,942	4,086	-28.0

* 1 chick = 1.27 eggs • 1 poussin = 1,27 oeufs

** combined due to confidentiality • chiffres regroupés pour confidentialité

Source : CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Chicken - 2005 Highlights

Chicken production in 2005 (page 23) increased by 3.7% (35.0 million kg) over 2004, with the majority of the increase, 28.2%, in British Columbia. In 2004, British Columbia's production was greatly reduced due to the outbreak of avian influenza (AI) in that province.

Four other provinces, Manitoba, Ontario, Prince Edward Island and Newfoundland and Labrador showed modest increases in production, 1.2%, 1.7%, 2.2% and 1.1% respectively. The remaining five provinces all showed marginal decreases in production.

In 2005, 107.3 million kg of chicken was imported (page 25), virtually unchanged from 2004. Most of Canada's chicken imports (89.1 million kg) come from the United States, however, Brazil continued to be a significant source of supply for Canada in 2005, supplying 17.1 million kg.

Chicken meat imported for re-export was 41.4 million kg or 38.6% of total imports. This was an increase of 29.5% over 2004. Under this program products can be imported into Canada for processing into value-added products and subsequently must be re-exported within six months.

The importation of chicken is based on a Tariff Rate Quota system (TRQ) (page 11) with the level for 2005 set at 72.5 million kg.

The United States is the main export market for Canadian chicken with exports (page 27) amounting to 31.2 million kg, followed by South Africa at 13.9 million kg and the Philippines at 11.8 million kg. Exports to South Africa are up 217% from 2004 as South Africa was one of the markets that banned all chicken originating from Canada during the 2004 AI outbreak.

Poulet - Points saillants pour 2005

En 2005, la production de poulets (page 23) a augmenté de 3,7 % (35,0 millions de kg) par rapport à 2004, la Colombie-Britannique comptant pour la majeure partie de cette augmentation, soit 28,2 %. La production avait grandement fléchi en Colombie-Britannique en 2004 en raison de la flambée de la grippe aviaire dans cette province.

Quatre autres provinces, le Manitoba, l'Ontario, l'Île-du-Prince-Édouard et Terre-Neuve-et-Labrador, ont montré une légère augmentation de la production, soit, 1,2 %, 1,7 %, 2,2 % et 1,1 % respectivement. Toutes les cinq autres provinces ont montré un léger fléchissement de production.

En 2005, on a importé 107,3 millions de kg de poulet (page 25), soit pratiquement la même quantité qu'en 2004. Le Canada a importé du poulet principalement des États-Unis (89,1 millions de kg); toutefois, le Brésil demeure en 2005 une source d'approvisionnement importante pour le Canada, en fournissant 17,1 millions de kg.

Les importations de viande de poulet destinée à la réexportation ont été de 41,4 millions de kg, soit 38.6 % des importations totales. Ce niveau était de 29,5 % supérieur à celui de 2004. En vertu de ce programme, il est possible d'importer au Canada des produits destinés à être transformés en produits à valeur ajoutée et réexportés dans la période de six mois qui suit.

L'importation de poulet est contrôlée dans le cadre d'un régime de contingents tarifaires (page 11), qui prévoit pour 2005 un niveau de 72,5 millions de kg.

Les États-Unis constituent notre principal marché d'exportation de poulet, (page 27) absorbant 31,2 millions de kg, suivi de l'Afrique du Sud (13,9 millions de kg) et des Philippines (11,8 millions de kg). Les exportations vers l'Afrique du Sud ont augmenté de 217 % par rapport à l'année 2004 car ce pays était l'un de ceux qui ont interdit toutes importations de poulet canadien lors de la crise de la grippe aviaire en 2004.

Chicken / Poulet

Highlights / Points saillants

	2005	2004	2003	2002	2001
Number of Producers Nombre de producteurs	2,786	2,787	2,808	2,851	2,815
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	1,614.9	1,577.7	1,524.4	1,452.9	1,522.3
Production (000 000 kg) Production (000 000 kg)	981.3	946.2	934.5	939.0	930.1
Per Capita Consumption (kg) Consommation par personne (kg)	30.7	30.4	30.1	30.7	30.5
Consumer Price Index (1992=100) Indice des prix à la consommation (1992=100)	133.3	133.1	123.6	116.7	116.2
Exports ($000 000) Exportations (000 000 $)	183.7	169.4	143.4	151.6	131.7
Imports ($000 000) Importations (000 000 $)	345.6	423.6	335.9	353.5	341.4
Storage Stocks on December 31 (000 kg) Stocks en entrepôt au 31 décembre (000 kg)	38,359	33,065	23,566	28,946	29,274

Chicken Production Timeline
Cycle de production du poulet

Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 140 eggs during their lay period. Hatcheries incubate these fertilized chicken eggs for 3 weeks producing chicks that are placed on farms of chicken producers for approximately 6 weeks before processing. Primary processing plants slaughter birds and prepare the meat for the retail and food service markets. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat.

Primary Breeders
Éleveurs-souches

Multiplier Breeders
Éleveurs-multiplicateurs

Breeder Growers
Éleveurs sélectionneurs
0 20
wks/sem

Hatching Egg Producers
Producteurs d'oeufs d'incubation
26 60
wks/sem

Eggs / Oeufs

Hatchery / Couvoir
3 wks/sem

Chicken Producers
Producteurs de poulet
0 6
wks/sem

Broilers
Poulet à griller

Processing
Transformation

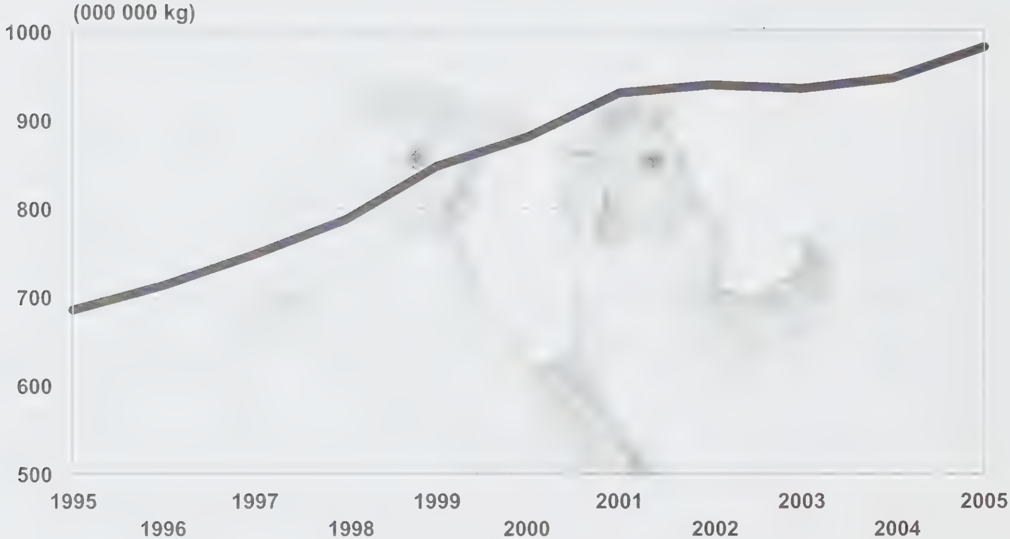
Further Processing
Surtransformation

Retail
Détail

Les reproducteurs primaires produisent des oiseaux génétiquement améliorés, qui pondent ultérieurement environ 140 oeufs durant leur période de ponte. Les couvoirs incubent ces oeufs fertilisés de poulet pendant 3 semaines afin de produire les poussins qui seront placés dans les poulaillers des producteurs de poulet durant environ 6 semaines avant leur transformation. Les usines de transformation primaire abattent ces oiseaux et préparent la viande pour les magasins de détail et les services alimentaires. Les oiseaux peuvent être vendus entiers ou en découpes, ou encore surtransformés en produits prêts à être consommés, comme des pâtés congelés, des repas congelés ou de la charcuterie.

Source : National Farm Products Council • Conseil national des produits agricoles

Chicken Production
Production de poulet
1995 - 2005



Source : 1995-1997 Agriculture and Agri-Food Canada • 1995-1997 Agriculture et Agroalimentaire Canada
1998-2005 CFC • 1998-2005 PPC

Chicken Production
Production de poulet

Prov	2005 Production (000 kg)	2004 Production (000 kg)	2005/2004 Change Changement %	2005 % Canadian Total % du total canadien %
BC	154,453	120,466	28.2	15.7
AB	86,839	86,946	-0.1	8.8
SK	32,525	33,156	-1.9	3.3
MB	40,463	39,980	1.2	4.1
ON	325,143	319,760	1.7	33.1
QC	264,936	269,120	-1.6	27.0
NB	26,754	26,786	-0.1	2.7
NS	33,311	33,393	-0.2	3.4
PE	3,656	3,578	2.2	0.4
NL	13,195	13,051	1.1	1.3
Canada	981,275	946,236	3.7	100.0
West/Ouest	314,280	280,548	12.0	32.0
Central/Centre	590,079	588,880	0.2	60.1
East/Est	76,916	76,808	0.1	7.8

Source : CFC • PPC

Chicken Farm Cash Receipts (FCR) - 2005
Recettes monétaires agricoles (RMA) - Poulet - 2005

Prov	Chicken FCR RMA du poulet ($000)	% Canadian Total % du total canadien %	Chicken FCR as a % of Total FCR RMA du poulet en % des RMA totales %
BC	273,125	16.9	11.3
AB	141,945	8.8	1.8
SK	49,245	3.0	0.8
MB	66,705	4.1	1.8
ON	526,197	32.6	5.8
QC	427,355	26.5	6.9
NB	45,758	2.8	10.7
NS	55,895	3.5	12.3
PE and/et NL	28,700	1.8	--
Canada	1,614,925	100.0	4.4
West/Ouest	531,020	32.9	2.6
Central/Centre	953,552	59.0	6.3
East/Est	130,353	8.1	9.8

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Source : Statistics Canada • Statistique Canada

Chicken Exports / Exportations de poulet

	2005		2004		
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)	
United States	118.4	31.2	132.4	28.1	États-Unis
South Africa	12.4	13.9	3.8	4.4	Afrique du Sud
Philippines	10.6	11.8	5.0	5.9	Philippines
Hong Kong	6.6	8.9	6.0	7.4	Hong Kong
Russia	6.4	6.6	2.6	4.1	Russie
Others	29.3	30.0	19.6	25.8	Autres
Total	183.7	102.4	169.4	75.7	Total

Source : Statistics Canada • Statistique Canada

Volume of Chicken Imports / Quantité de poulet importé

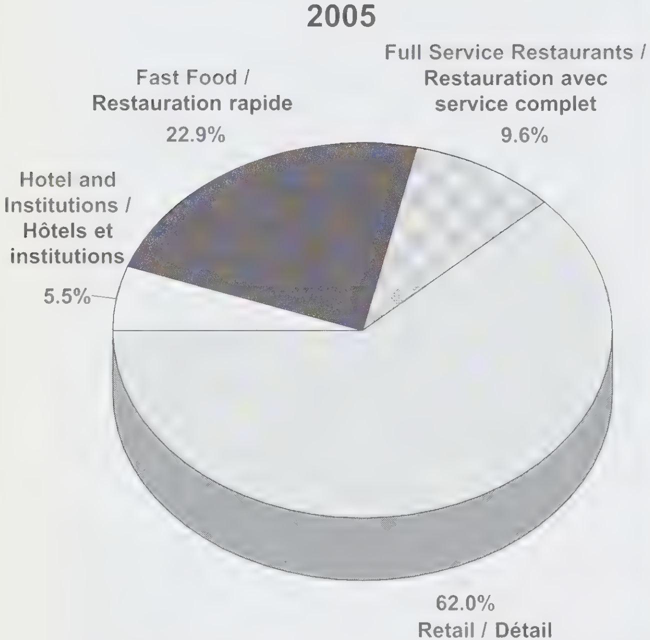
	2005	2004	2005/2004 Change Changement	
	(000 000 kg)	(000 000 kg)	%	
Whole Carcass	0.9	8.8	-89.9	Carcasses entières
Breasts	35.6	32.2	10.6	Poitrines
Wings	16.4	23.2	-29.5	Ailes
Boneless Parts	8.6	9.0	-4.7	Découpes désossées
Cooked	12.2	11.4	7.3	Cuits
Others	15.1	6.4	136.0	Autres
Further Processed	18.5	16.3	13.4	Surtransformés
Total	107.3	107.3	-0.1	Total

Includes quantities imported under the import for re-export program

Inclut les quantités importées en vertu du programme d'importation pour ré-exportation

Source : Agriculture and Agri-Food Canada, actual weight • Agriculture et Agroalimentaire Canada, poids réel

Chicken Consumption by Market Sector
Consommation de poulet par segment du marché

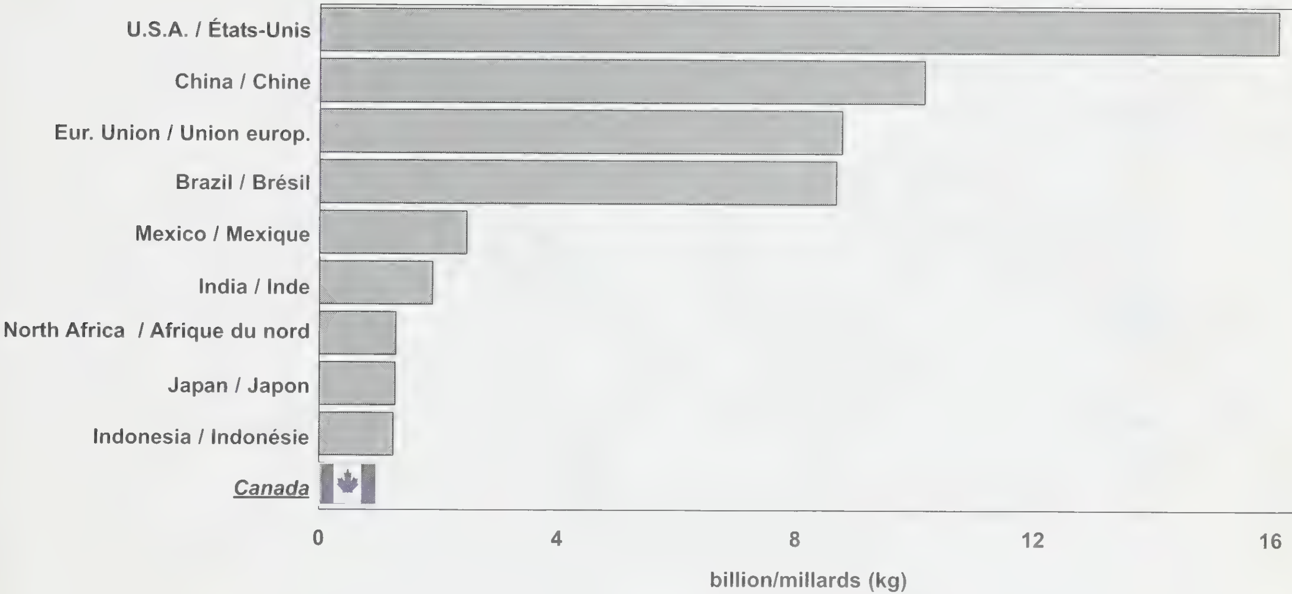


	2005	2004	2003	2002	2001
	(000 000 kg)				
Retail/ Détail	625	611	595	608	597
Fast Food/ Restauration rapide	231	221	213	211	203
Full Service Restaurants/ Restauration avec service complet	97	92	90	94	92
Hotel and Instutions/ Hôtels et institutions	55	54	53	54	54
Total	1008	978	951	967	946

Source : Further Poultry Processors Association of Canada • Association canadienne des surtransformateurs de volailles

Major Chicken Meat Producing Countries
Principaux pays producteurs de viande de poulet

2005



Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

Turkey - 2005 Hightlights

Turkey production in 2005 set a record high, amounting to 154.8 million kg, breaking the previous high of 151.8 million kg set in 2000. Production is up 7.3% over 2004 (page 33) with the largest increase, 53.0%, shown in British Columbia. In 2004, production in British Columbia was diminished due to avian influenza.

Of interest, in 2000, it took 21.2 million turkeys to produce 151.8 million kg of turkey meat while in 2005, it took only 20.4 million birds to produce the record high production of 154.8 million kg. Meaning, producers, on average, are producing heavier birds.

Imports of turkey are based on a Tariff Rate Quota (TRQ) system (page 11) with a WTO access level of 5.6 million kg on an eviscerated weight basis. In 2005, 95.5% of TRQs were utilized. Supplementary import permits may be issued over and above the TRQ access level. In 2005, 6.0 million kg were imported under these permits. Meat imported for re-export, amounted to 1.6 million kg in 2005 or 13.8% of total import permits issued.

Imports (page 35) amounted to 11.9 million kg, an increase of 32.7% over 2004. Most of the increase came in as boneless meat, an increase of 326% over the previous year. All turkey meat imported originated from the United States. These imports were valued at $44.7 million in 2005, an increase of $12.4 million or 37.1% over 2004.

Exports in 2005 amounted to 24.1 million kg, an increase of 30.7% over 2004 (page 35). The United States continued to be Canada's largest export market for turkey in terms of dollar value and volume.

Dindon - Points saillants pour 2005

La production de dindon a atteint un niveau record en 2005 s'elevant à 154,8 millions de kg, brisant ainsi le précédent record de 151,8 millions de kg atteint en 2000. La production est en hausse de 7,3 % par rapport à 2004 (page 33). La Colombie-Britannique a connu la hausse la plus importante, soit 53,0 %. La production avait fléchi en 2004 dans cette province en raison de la crise de la grippe aviaire.

Il est intéressant de noter qu'en 2000, il avait fallu 21,2 millions de dindons pour produire 151,8 millions de kg de viande de dindon alors qu'en 2005, seulement 20,4 millions d'oiseaux ont été nécessaires pour atteindre un niveau de production record de 154,8 millions de kg. Cela signifie qu'en moyenne, les producteurs produisent des oiseaux plus gros.

L'importation de dindon est contrôlée par un régime de contingents tarifaires (page 11) qui prévoit en vertu de l'OMC un niveau d'accès de 5,6 millions de kg (poids éviscéré). En 2005, 95,5 % des contingents tarifaires ont été utilisés. Outre les contingents tarifaires, l'industrie peut obtenir des licences supplémentaires. Ainsi, en 2005, l'industrie a importé 6,0 millions de kg grâce à ces licences. La quantité de viande importée aux fins de réexportation, a atteint 1,6 million de kg en 2005, ce qui représentait 13,8 % des importations totales autorisées par des licences.

Les importations (page 35) ont atteint 11,9 millions de kg, une hausse de 32,7 % par rapport à 2004. La majeure partie de l'augmentation (326 % par rapport à l'année précédente) portait sur la viande de poitrine désossée. Toute la viande de dindon importée provenait des États-Unis. La valeur de ces importations a été de 44,7 millions de dollars en 2005, une augmentation de 12,4 millions de dollars ou de 37,1 % par rapport à 2004.

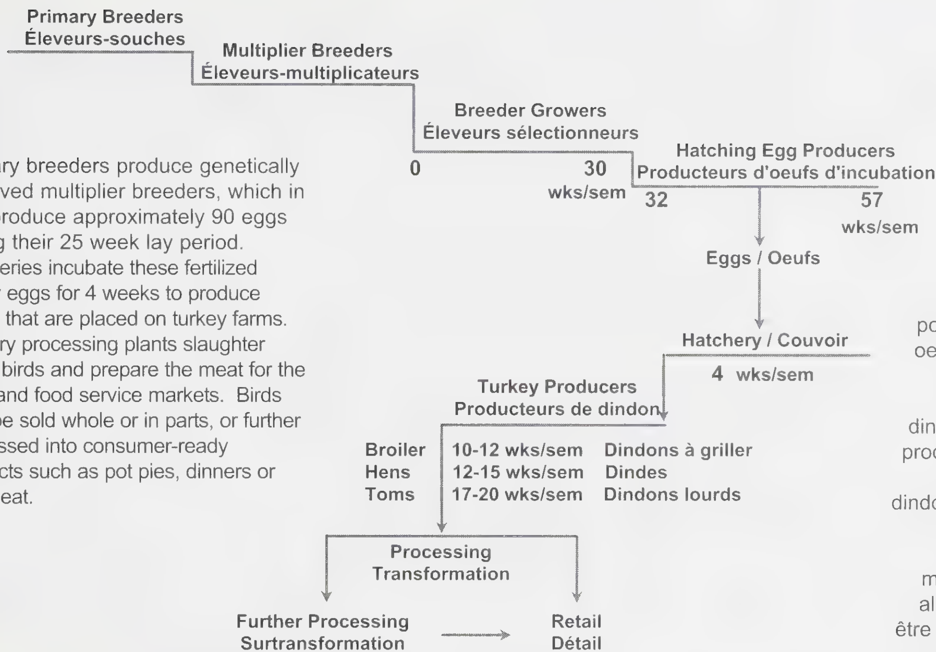
Les exportations en 2005 se sont élevées à 24,1 millions de kg, une hausse de 30,7 % par rapport à 2004 (page 35). Les États-Unis sont restés le principal marché du dindon pour le Canada, tant en quantité qu'en valeur.

Turkey / Dindon

Highlights / Points saillants

	2005	2004	2003	2002	2001
Number of Producers Nombre de producteurs	543	538	550	556	542
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	271.4	267.6	260.7	258.8	262.6
Production (000 000 kg) Production (000 000 kg)	154.8	144.3	148.1	145.7	148.5
Per Capita Consumption (kg) Consommation par personne (kg)	4.3	4.2	4.1	4.3	4.2
Consumer Price Index (1992=100) Indice des prix à la consommation (1992=100)	142.7	135.5	131.7	131.4	128.4
Exports ($000 000) Exportations (000 000 $)	30.1	21.6	16.8	17.1	18.2
Imports ($000 000) Importations (000 000 $)	44.7	32.6	23.3	26.5	23.8
Storage Stocks on December 31 (000 kg) Stocks en entrepôt au 31 décembre (000 kg)	12,412	11,730	15,859	13,956	19,219

Turkey Production Timeline
Cycle de production du dindon



Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 90 eggs during their 25 week lay period. Hatcheries incubate these fertilized turkey eggs for 4 weeks to produce poults that are placed on turkey farms. Primary processing plants slaughter these birds and prepare the meat for the retail and food service markets. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat.

Les reproducteurs primaires produisent des oiseaux génétiquement améliorés, qui pondent ultérieurement environ 90 oeufs durant leur période de ponte de 25 semaines. Les couvoirs incubent ces oeufs fertilisés de dindon pendant 4 semaines afin de produire les dindonneaux qui seront placés dans les exploitations de dindon. Les usines de transformation primaire abattent ces oiseaux et préparent la viande pour les magasins de détail et les services alimentaires. Les oiseaux peuvent être vendus entiers ou en découpes, ou encore surtransformés en produits prêts à être consommés, comme des pâtés congelés, des repas congelés ou de la charcuterie.

Source : National Farm Products Council • Conseil national des produits agricoles

Turkey Production
Production de dindon
1995 - 2005

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Turkey Production
Production de dindon

Prov	2005 Production (000 kg)	2004 Production (000 kg)	2005/2004 Change Changement %	2005 % Canadian Total % du total canadien %
BC	19,543	12,773	53.0	12.6
AB	12,875	11,917	8.0	8.3
SK	4,419	4,881	-9.5	2.9
MB	10,515	9,482	10.9	6.8
ON	69,738	67,902	2.7	45.0
QC	31,508	31,413	0.3	20.4
NB	2,693	2,438	10.5	1.7
NS	3,539	3,516	0.7	2.3
PE	--	--	--	--
NL	--	--	--	--
Canada	154,830	144,322	7.3	100.0
West/Ouest	47,352	39,053	21.3	30.6
Central/Centre	101,246	99,315	1.9	65.4
East/Est	6,232	5,954	4.7	4.0

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Source : Agriculture and Agri-Food Canada and CTMA • Agriculture et Agroalimentaire Canada et l'OCCD

Turkey Farm Cash Receipts (FCR) - 2005
Recettes monétaires agricoles (RMA) - Dindon - 2005

Prov	Turkey FCR RMA du dindon ($000)	% Canadian Total % du total canadien %	Turkey FCR as a % of Total FCR RMA du dindon en % des RMA totales %
BC	33,712	12.4	1.4
AB	24,289	9.0	0.3
SK	8,098	3.0	0.1
MB	18,064	6.7	0.5
ON	121,559	44.8	1.3
QC	54,993	20.3	0.9
NB	4,502	1.7	1.1
NS	6,066	2.2	1.3
PE and/et NL	69	--	--
Canada	271,352	100.0	0.7
West/Ouest	84,163	31.0	0.4
Central/Centre	176,552	65.1	1.2
East/Est	10,637	3.9	0.8

-- number too small • nombres infimes

Source : Statistics Canada • Statistique Canada

Turkey Exports / Exportations de dindon

	2005 ($000 000)	2005 (000 000 kg)	2004 ($000 000)	2004 (000 000 kg)	
United States	12.6	5.1	9.7	3.0	États-Unis
Bulgaria	3.8	4.0	1.0	1.4	Bulgarie
South Africa	3.8	4.4	1.5	1.8	Afrique du Sud
Russia	3.1	2.6	1.5	2.0	Russie
Bahamas	0.8	0.8	0.8	0.9	Bahamas
Others	6.0	7.2	7.1	9.4	Autres
Total	30.1	24.1	21.6	18.5	Total

Source : Statistics Canada • Statistique Canada

Volume of Turkey Imports / Quantité de dindon importé

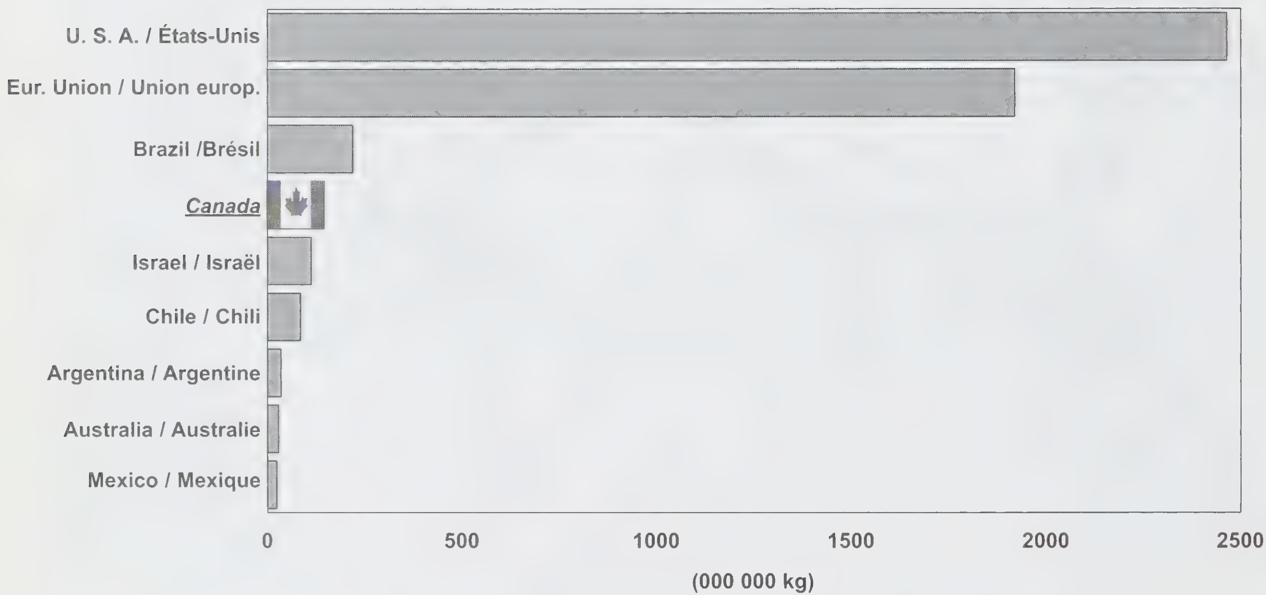
	2005 (000 000 kg)	2004 (000 000 kg)	2005/2004 Change Changement %	
Live	-	-	-	Vivants
Whole Carcass	0.3	0.1	125.1	Carcasses entières
Breasts	3.3	3.3	1.5	Poitrines
Other Boneless	2.8	0.6	326.1	Autres désossés
Bone In Parts	0.0	0.0	-	Découpes avec os
Cooked	0.6	0.5	1.5	Cuits
Further Processed	5.0	4.4	14.1	Surtransformés
Total	11.9	9.0	32.7	Total

Includes quantities imported under the import for re-export program

Inclut les quantités importées en vertu du programme d'importation pour ré-exportation

Source : Agriculture and Agri-Food Canada, actual weight • Agriculture et Agroalimentaire Canada, poids réel

Major Turkey Meat Producing Countries
Principaux pays producteurs de viande de dindon
2005



Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

NFPC CNPA Notes

CNPA NFPC Notes

Eggs - 2005 Highlights

Egg production in 2005 (page 43) amounted to 517.4 million dozen eggs, up 7.5% over 2004. The largest increase occurred in British Columbia which showed an increase of 40.2%. This increase is due to British Columbia reaching full production capacity in late 2005 after the depopulation of 1.4 million layers in 2004.

Farm cash receipts (page 44), on the other hand, are down 3.3% from 2004, amounting to $547.1 million. This is the lowest level of farm cash receipts since 2001.

Total imports (page 46) amounted to 27.5 million kg liquid equivalent representing a decrease of 24.5% or 9.1 million kg liquid equivalent from 2004. However, imports last year were unusually high as additional supply was necessary to meet British Columbia's shell eggs needs during the avian influenza outbreak. The import of shell eggs this year are down 6.6 million kg liquid equivalent (11.3 million eggs) from 2004.

In terms of dollar value, Japan is now the leading importer of Canadian egg products (page 45). Exports to Japan had a value of $12.6 million and it makes up 41.7% of the total export value. Exports to the United States are down 39.2% in volume and 76.5% in value. The drop in volume and value is due to the overproduction of eggs in the United States.

Industrial product (page 47) refers to eggs that are in excess of local or provincial requirements for the table market. On a national basis, industrial product increased 21.6 million dozen or 21.5% increase over 2004. This increase can be attributed to after effects of avian influenza in 2004 plus a slight decrease in egg consumption.

Oeufs - Points saillants pour 2005

La production d'oeufs (page 43) a totalisé 517,4 millions de douzaines en 2005, soit une augmentation de 7,5 % par rapport à 2004. On a observé l'augmentation la plus importante en Colombie-Britannique, soit une hausse de 40,2 %. Cette augmentation est attribuable au fait que le niveau de production de la Colombie-Britannique est revenu à la normale à la fin de 2005, après l'abattage intégral de 1,4 million de pondeuses en 2004.

Par ailleurs, les recettes agricoles (page 44) ont fléchi de 3,3 % par rapport à 2004, totalisant 547,1 millions de dollars. Il s'agit du taux le plus faible de recettes agricoles depuis 2001.

Les importations (page 46) ont totalisé 27,5 millions de kg (équivalent liquide), représentant une baisse de 24,5%, ou 9,1 millions de kg (équivalent liquide), par rapport à 2004. Les importations ont toutefois été anormalement élevées l'an dernier en raison de l'approvisionnement supplémentaire nécessaire pour répondre aux besoins de la Colombie-Britannique en oeufs de consommation pendant la flambée de la grippe aviaire. Cette année, les importations d'oeufs de consommation sont en baisse de 6,6 millions de kg en équivalent liquide (11,3 millions d'oeufs) par rapport à 2004.

En ce qui concerne la valeur monétaire, le Japon est maintenant le principal importateur de produits d'oeufs canadiens (page 45). Les exportations vers le Japon ont totalisé 12,6 millions de dollars et représentent 41,7 % de la valeur totale des exportations. Les exportations vers les États-Unis sont en baisse de 39,2 % en volume et de 76,5 % en valeur. Le dimunition du volume et de la valeur est dû à la surproduction d'oeufs aux États-Unis.

Les produits industriels (page 47) désignent les oeufs excédentaires aux besoins du marché local ou provincial d'oeufs de consommation. Sur la scène nationale, les produits industriels ont augmenté de 21,6 millions de douzaines, soit une hausse de 21,5 % par rapport à 2004. Cette augmentation est attribuable aux répercussions à la flambée de la grippe aviaire en 2004, jumelé à une légère diminution de la consommation d'oeufs.

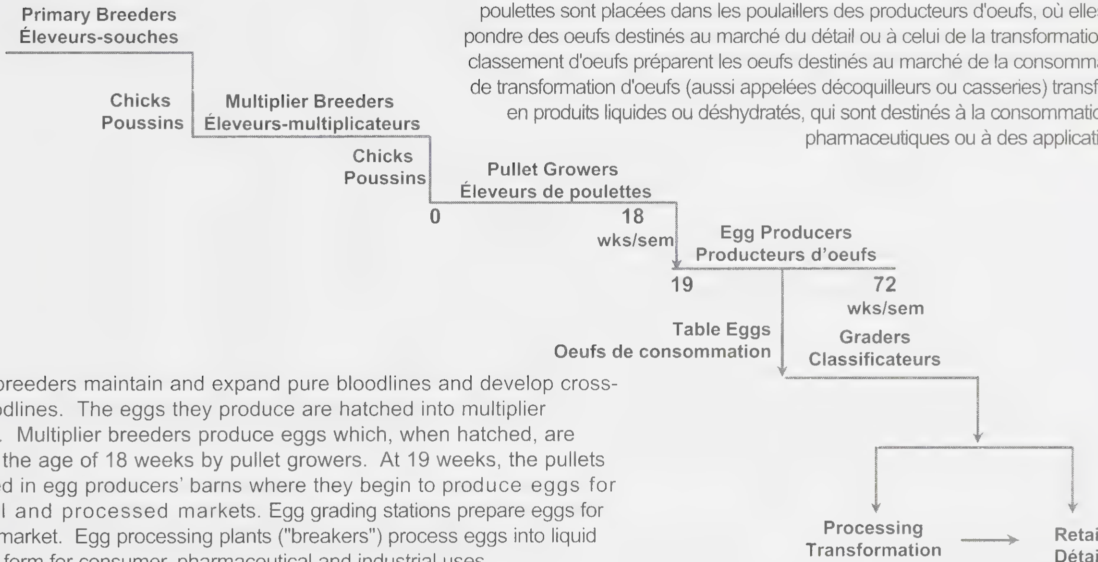
Eggs / Oeufs

Highlights / Points saillants

	2005	2004	2003	2002	2001
Number of Producers Nombre de producteurs	1,069	1,078	1,100	1,128	1,146
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	547.1	565.9	566.0	575.0	547.9
Production (000 000 dozen) Production (000 000 douzaines)	517.4	481.4	498.5	494.6	474.1
Per Capita Consumption (dozen) Consommation par personne (douzaine)	15.6	15.3	15.6	15.4	15.9
Consumer Price Index (1992=100) Indice des prix à la consommation (1992=100)	146.1	144.3	140.4	133.9	129.3
Exports ($000 000) Exportations (000 000 $)	30.1	40.7	42.9	41.7	30.7
Imports ($000 000) Importations (000 000 $)	35.0	59.4	37.5	31.6	30.8
Storage Stocks - Frozen and Dried egg on December 31 (converted to 000 dozens) Stocks en entrepôt - congelés et déshydratés au 31 décembre (équivalent en 000 douzaines)	10,834	12,016	8,690	10,740	9,023

Egg Production Timeline
Cycle de production d'oeufs

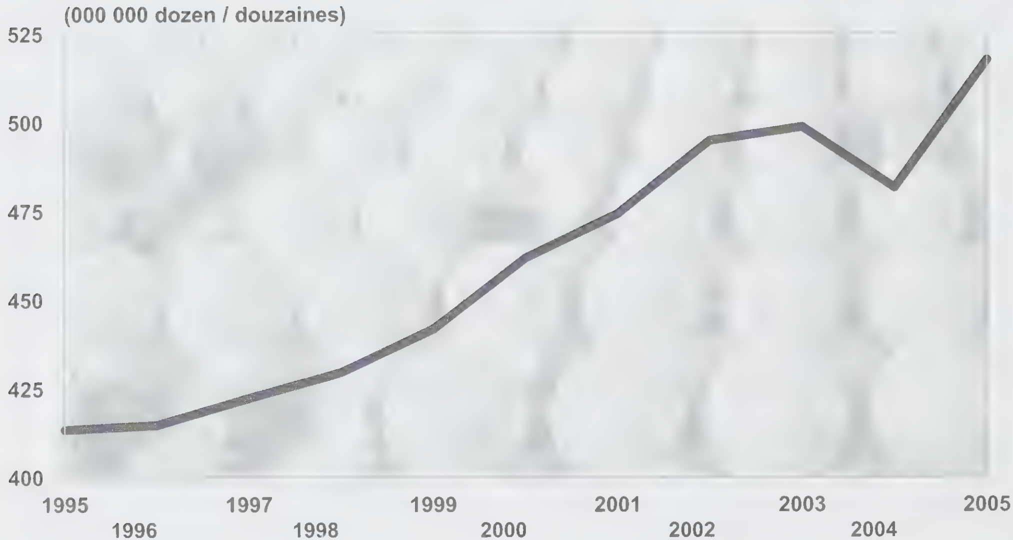
Les reproducteurs primaires maintiennent et élargissent les races pures et mettent au point des races hybrides. Ils produisent des oeufs qui seront incubés pour obtenir les reproducteurs de multiplicateurs. Ces derniers produisent les oeufs qui, une fois incubés, donneront les poussins que les éleveurs de poulettes garderont jusqu'à 18 semaines. À 19 semaines, les poulettes sont placées dans les poulaillers des producteurs d'oeufs, où elles commencent à pondre des oeufs destinés au marché du détail ou à celui de la transformation. Les postes de classement d'oeufs préparent les oeufs destinés au marché de la consommation. Les usines de transformation d'oeufs (aussi appelées décoquilleurs ou casseries) transforment les oeufs en produits liquides ou déshydratés, qui sont destinés à la consommation, à des usages pharmaceutiques ou à des applications industrielles.



Primary breeders maintain and expand pure bloodlines and develop cross-bred bloodlines. The eggs they produce are hatched into multiplier breeders. Multiplier breeders produce eggs which, when hatched, are grown to the age of 18 weeks by pullet growers. At 19 weeks, the pullets are placed in egg producers' barns where they begin to produce eggs for the retail and processed markets. Egg grading stations prepare eggs for the table market. Egg processing plants ("breakers") process eggs into liquid and dried form for consumer, pharmaceutical and industrial uses.

Source : National Farm Products Council • Conseil national des produits agricoles

Egg Production
Production d'oeufs
1995 - 2005



Source : CEMA • l'OCCO

Egg Production
Production d'oeufs

Prov	2005 Production (000 dozens) (000 douzaines)	2004 Production (000 dozens) (000 douzaines)	2005/2004 Change Changement %	2005 % Canadian Total % du total canadien %
BC	52,203	37,234	40.2	10.1
AB	43,407	40,676	6.7	8.4
NT	1,542	1,589	-3.0	0.3
SK	21,787	20,370	7.0	4.2
MB	56,503	54,023	4.6	10.9
ON	201,793	192,220	5.0	39.0
QC	99,654	95,037	4.9	19.3
NB	10,662	10,709	-0.4	2.1
NS	18,391	18,000	2.2	3.6
PE	3,021	3,146	-4.0	0.6
NL	8,419	8,418	0.0	1.6
Canada	517,381	481,420	7.5	100.0
West/Ouest	175,442	153,891	14.0	33.9
Central/Centre	301,447	287,256	4.9	58.3
East/Est	40,492	40,273	0.5	7.8

Source : CEMA • l'OCCO

Egg Farm Cash Receipts (FCR) - 2005
Recettes monétaires agricoles (RMA) - Oeufs - 2005

Prov	Egg FCR RMA des oeufs ($000)		% Canadian Total % du total canadien %	Egg FCR as a % of Total FCR RMA des oeufs en % des RMA totales %
BC	56,924		10.4	2.4
AB	43,142		7.9	0.5
SK	22,689		4.1	0.4
MB	60,665		11.1	1.6
ON	207,384		37.9	2.3
QC	94,525		17.3	1.5
NB	17,076		3.1	4.0
NS	27,163		5.0	6.0
PE	4,110		0.8	1.1
NL	13,410		2.5	14.7
Canada	547,088	*	100.0	1.5
West/Ouest	183,420		33.5	0.9
Central/Centre	301,909		55.2	2.0
East/Est	61,759		11.3	4.6

Note : Statistics Canada does not publish FCR for NT. • Statistique Canada ne publie pas les recettes agricoles des T.N.-O

* includes $13.0 million for hatching eggs • inclut 13,0 millions $ pour les oeufs d'incubation

Source : Statistics Canada • Statistique Canada

Egg Product Exports - by Category
Produits d'oeufs exportés - par catégorie

	2005		2004		
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)	
Whole Egg					**Oeufs entiers**
Liquid/Frozen	0.9	0.6	1.3	0.7	Liquides ou surgelés
Dried	2.9	0.8	5.3	1.2	Déshydratés
Egg Albumen					**Albumen**
Liquid/Frozen	1.6	2.2	7.0	4.0	Liquide ou surgelé
Dried	13.8	2.4	16.9	2.3	Déshydraté
Egg Yolks					**Jaunes d'oeufs**
Liquid/Frozen	4.1	2.4	2.8	1.3	Liquides ou surgelés
Dried	6.8	2.6	7.5	2.0	Déshydratés
Total	30.1	11.0	40.7	11.5	**Total**

Note : Exports of shell eggs are minimal • Les exportations d'oeufs en coquille sont minimes

Source : Statistics Canada • Statistique Canada

Egg Product Exports - by Country
Produits d'oeufs exportés - par pays

Destination	2005		2004		Destination
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)	
Japan	12.6	3.0	9.7	2.5	Japon
United States	5.5	4.0	23.3	6.6	États-Unis
Venezuela	3.2	1.7	2.3	1.0	Vénézuela
Others	8.8	2.3	5.4	1.4	Autres
Total	30.1	11.0	40.7	11.5	**Total**

Source : Statistics Canada • Statistique Canada

Egg Imports
Importations d'oeufs

	2005 (000 000)		2004 (000 000)		
	($)	(kg)	($)	(kg)	
Whole Egg					**Oeufs entiers**
Liquid/Frozen	0.9	0.7	2.9	2.4	**Liquides ou surgelés**
Dried	1.1	0.5	2.3	1.2	**Déshydratés**
Egg Albumen					**Albumen**
Liquid/Frozen	3.6	6.1	6.2	5.1	**Liquide ou surgelé**
Dried	0.8	0.0	0.9	0.1	**Déshydraté**
Egg Yolks					**Jaunes d'oeufs**
Liquid/Frozen	1.9	1.3	3.6	2.4	**Liquides ou surgelés**
Dried	0.0	0.0	0.2	0.0	**Déshydratés**
Further Processed Eggs	5.4	2.3	5.7	2.2	**Oeufs surtransformés**
Shell Eggs (liquid equivalent)	21.3	16.6	37.6	23.2	**Oeufs en coquille (équivalent liquide)**
Total (liquid equivalent)	35.0	27.5	59.4	36.6	**Total** (équivalent liquide)

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Industrial Product Volumes
Quantité de produits industriels

Prov	2005 (000 dozens) (000 douzaines)	2004 (000 dozens) (000 douzaines)	2005/2004 Change Changement (%)
BC	11,252	5,141	118.9
AB	8,677	8,076	7.4
NT	3,725	3,559	4.7
SK	26,328	22,206	18.6
MB	42,508	35,513	19.7
ON	13,845	10,644	30.1
QC	2,921	2,734	6.8
NB	6,438	5,950	8.2
NS	1,444	1,546	-6.6
PE	3,627	3,612	0.4
NL	1,346	1,531	-12.1
Canada	122,111	100,511	21.5

Source : CEMA • l'OCCO

Processed Egg Production
Production d'oeufs de transformation

(000 kg - liquid equivalent / équivalent liquide)

	2005	2004	2003	2002	2001	
Whole Egg	37.1	39.9	40.2	38.1	35.5	Oeufs entiers
Yolk	13.4	11.2	12.4	15.6	13.5	Jaune
Albumen	26.4	21.9	23.9	29.3	24.9	Albumen
Total	76.9	73.0	76.5	83.0	73.9	Total

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Eggs Broken for Processing
Oeufs cassés destinés à la transformation

(000 dozens / douzaines)

	2005	2004	2003	2002	2001	
Eggs	161,318	144,952	143,222	160,151	143,697	Oeufs

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

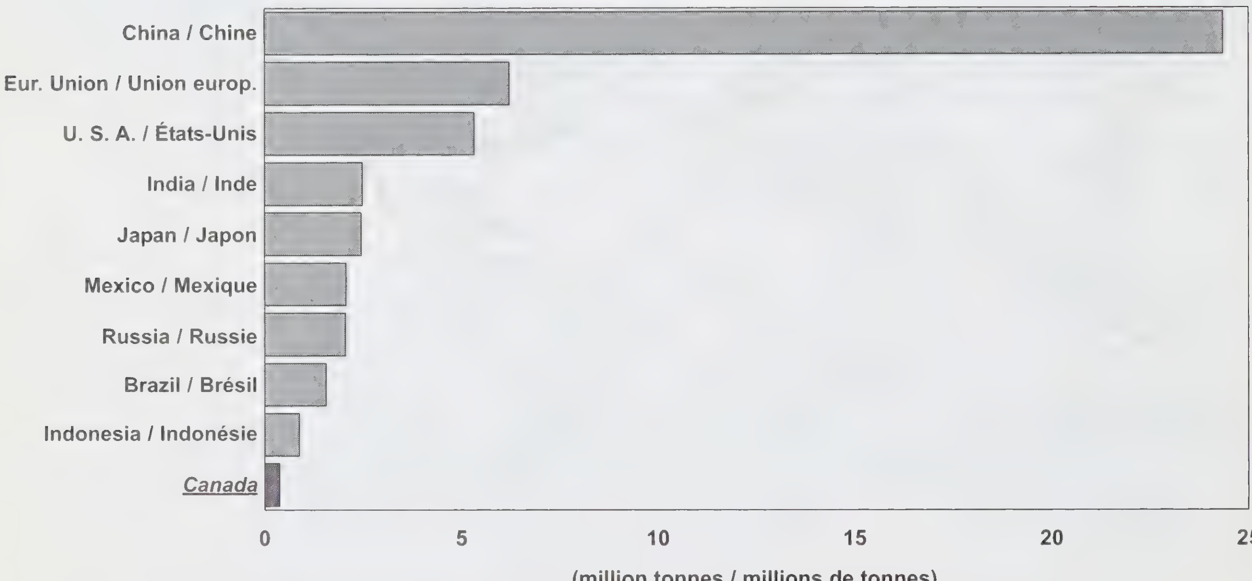
Per Capita Consumption of Shell and Processed Eggs
Consommation par personne - Oeufs en coquille et transformés

(dozens per person / douzaines par personne)

	2005	2004	2003	2002	2001	
Processed Egg	3.8	3.6	3.8	3.9	3.7	**Oeufs transformés**
Shell Egg	11.8	11.7	11.8	11.5	12.2	**Oeufs en coquille**
Total Domestic Consumption	15.6	15.3	15.6	15.4	15.9	**Production intérieure totale**

Source : Statistics Canada and CEMA • Statistique Canada et l'OCCO

Major Egg Producing Countries
Principaux pays producteurs d'oeufs
2005



Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

Industry Contacts / Contacts de l'industrie

Canadian Egg Marketing Agency
Office canadien de commercialisation des oeufs
1501 - 112, rue Kent Street
Ottawa, Ontario
K1P 5P2
Tel./Tél. : (613) 238-2514
Fax/Téléc. : (613) 238-1967
www.canadaegg.ca
Contact : Tim Lambert, Chief Executive Officer / chef de la direction

Chicken Farmers of Canada
Producteurs de poulet du Canada
1007 - 350, rue Sparks Street
Ottawa, Ontario K1R 7S8
Tel./Tél. : (613) 241-2800
Fax/Téléc. : (613) 241-5999
www.chicken.ca
Contact : Mike Dungate, General Manager / directeur général

Canadian Poultry and Egg Processors Council
Conseil canadien des transformateurs d'oeufs et de volailles
400 - 1545, avenue Carling Avenue
Ottawa, Ontario
K1Z 8P9
Tel./Tél. : (613) 724-6605
Fax/Téléc. : (613) 724-4577
www.cpepc.ca
Contact : Robin Horel, President and CEO / président et chef de la direction

Canadian Turkey Marketing Agency
Office canadien de commercialisation du dindon
202 - 7145, avenue West Credit Avenue
Building 1, édifice 1
Mississauga, Ontario
L5N 6J7
Tel./Tél. : (905) 812-3140
Fax/Téléc. : (905) 812-9326
www.canadianturkey.ca
Contact : Phil Boyd, Executive Director / directeur exécutif

Canadian Broiler Hatching Egg Marketing Agency
Office canadien de commercialisation des oeufs d'incubation de poulet à chair
1101 - 75, rue Albert Street
Ottawa, Ontario
K1P 5E7
Tel./Tél. : (613) 232-3023
Fax/Téléc. : (613) 232-5241
www.cbhema.com
Contact : Errol Halkai, General Manager / directeur général

Further Poultry Processors Association of Canada
Association canadienne des surtransformateurs de volailles
203 - 2525, boulevard St. Laurent Blvd
Ottawa, Ontario
K1H 8P5
Tel./Tél. : (613) 738-1175
Fax/Téléc. : (613) 733-9501
www3.sympatico.ca/fppac
Contact : Robert DeValk, General Manager / directeur général

fppac

www.nfpc-cnpa.gc.ca

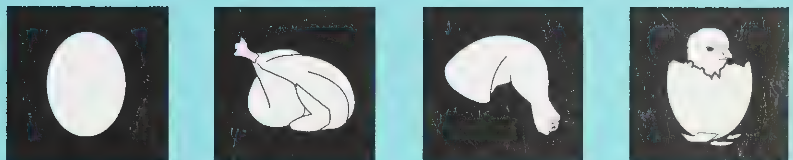
National Farm Products Council

Conseil national des produits agricoles

Poultry and Egg Industry

(data 2006)

2007



ndustrie de la volaille et des oeufs

(données de 2006)

Canada

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Introduction

Welcome to the 2007 edition of the National Farm Products Council's (NFPC) Poultry and Egg Industry handbook. This reference guide uses 2006 data obtained from industry and government relating to the poultry meat and egg industry.

Canada's poultry and egg industry operates within an orderly marketing framework called supply management. There are four national marketing agencies - the Canadian Egg Marketing Agency (CEMA) established in 1972, the Canadian Turkey Marketing Agency (CTMA) established in 1974, the Chicken Farmers of Canada (CFC) established in 1978 and the Canadian Broiler Hatching Egg Marketing Agency (CBHEMA) established in 1986.

The NFPC oversees the operations of the four marketing agencies, reviews orders and regulations made by the agencies and considers complaints brought against agency decisions.

The NFPC also works closely with provincial and territorial government agencies that are responsible for supervising commodity boards at the provincial level. The NFPC along with its provincial and territorial counterparts have established the National Association of Agri-Food Supervisory Agencies as a forum to discuss issues of common interest.

Introduction

Le Conseil national des produits agricoles (CNPA) vous présente la version 2007 de son Recueil de données pour l'industrie de la volaille et des oeufs. Ce guide de référence utilise les données recueillies pour 2006 auprès de l'industrie et du gouvernement concernant l'industrie de la viande de volaille et des oeufs.

L'industrie canadienne de la volaille et des oeufs opère dans un cadre de commercialisation réglementée appelé la gestion de l'offre. Elle dispose de quatre offices canadiens de commercialisation : l'Office canadien de commercialisation des oeufs (OCCO) établi en 1972, l'Office canadien de commercialisation du dindon (OCCD) établi en 1974, les Producteurs de poulet du Canada (PPC) établis en 1978 et l'Office canadien de commercialisation des oeufs d'incubation de poulet à chair (OCCOIPC) établi en 1986.

Le CNPA supervise les activités des offices canadiens de commercialisation, examine les ordonnances et règlements pris par ces offices et instruit les plaintes déposées à la suite de décisions prises par ces mêmes offices.

En outre, le CNPA travaille en étroite collaboration avec les organismes établis par les gouvernements provinciaux et territoriaux pour superviser les activités de leurs propres offices de commercialisation. De concert avec ses homologues provinciaux et territoriaux, le CNPA a établi l'Association nationale des régies agroalimentaires, qui constitue un forum où les offices canadiens peuvent discuter de questions d'intérêt mutuel.

Canada's Poultry and Egg Industry - At a glance

In 2006, Canadian production of chicken and hatching eggs was down 0.8% and 1.4%, while the production of turkey and eggs was up 5.0% and 1.8% respectively from 2005.

The total number of Canadian poultry and egg producers experienced its fourth consecutive year of decline; dropping from 4,826 in 2002 to 4,666 producers in 2006. Of the total of poultry and egg producers, 59.8% were chicken producers, 11.9% were turkey producers, 22.6% were egg producers and 5.7% were hatching egg producers. The number of chicken and turkey producers increased slightly, while the number of egg and egg hatching producers declined slightly over the year.

Total Farm Cash Receipts (FCR) of the poultry and egg industries have been stable for several years and were valued at $2.6 billion in 2006. The 2006 poultry and egg receipts accounted for 7.0% of the total Canadian agricultural receipts; a decrease of 0.1 percentage point from 2005.

The importation of poultry and egg products is overseen by the Department of Foreign Affairs and International Trade under a Tariff Rate Quota (TRQ) system. Further, an import for re-export program exists for poultry and egg products. Total imports of chicken have increased in value by 4.3% in 2006 from $350.8 million to $366.1 million. Total imports of eggs, broilers hatching eggs and turkey in 2006 were valued at $28.7 million, $30.0 million and $32.2 million respectively. The total import values of eggs and egg products, hatching eggs and turkey have dropped by 18.0%, 11.2% and 29.4% respectively over the year.

Canadian exports of chicken have increased in value by 1.2% and reached $185.9 million in 2006. The total value of exports of turkey and of egg and egg products have decreased by 11.1% and 11.0% to $26.7 million and $27.0 million respectively (page 8). The United States was the largest purchaser of Canadian chicken and turkey products; purchasing 75.4% and 51.3% of exported Canadian chicken and turkey products in value respectively. Japan was the largest purchaser of exported Canadian egg products, purchasing 37.8% of Canada's exported egg products.

The trend in chicken consumption in Canada has continued to rise slightly upward in 2006, while the trend in egg and turkey consumption has been stable; near its current levels for the last 5 years. The per capita consumption of chicken has risen steadily over the last 4 years to reach 31.8 kg in 2006 compared to 30.7 kg in 2002. Per capita consumption of turkey and table eggs and egg products reached 4.4 kg and 15.6 dozen respectively. As competitive meat products, beef consumption has been slowly increasing over the last 5 years (except for 2004), while pork consumption has declined 4.5 kg per person over the last 4 years.

The Consumer Price Index (CPI) for "all food" has been steadily increasing through recent years (page 10), it increased 2.4% throughout 2006. However, price levels of chicken and turkey products have remained stable through the year. Compared to 2005, the egg CPI has increased by 2.6%, the chicken CPI has increased by 0.4% and the turkey CPI has declined by 0.3%. The CPI for competitive products such as beef has increased by 0.1% while the pork CPI has dropped by 5.1% in one year.

L'industrie canadienne de la volaille et des oeufs - Coup d'oeil

En 2006, la production canadienne de poulets et d'oeufs d'incubation a décliné de 0,8 p. 100 et de 1,4 p. 100 respectivement, alors que la production de dindons et d'oeufs était en hausse de 5,0 p. 100 et de 1,8 p. 100 respectivement, en comparaison avec 2005.

Le nombre de producteurs de poulets et d'oeufs canadiens a diminué pour la quatrième année consécutive, passant de 4 826 en 2002 à 4 666 en 2006. Les producteurs de poulets représentent 59,8 p. 100 du nombre total de producteurs de volailles et d'oeufs, alors que les producteurs de dindons représentent 11,9 p 100, les producteurs d'oeufs, 22,6 p. 100, et les producteurs d'oeufs d'incubation, 5,7 p. 100. Le nombre de producteurs de poulets et de dindons a légèrement augmenté, alors que celui d'oeufs et d'oeufs d'incubation a faibli légèrement au cours de l'année.

Les recettes monétaires agricoles (RMA) totales pour l'industrie de la volaille et des oeufs sont stables depuis plusieurs années et ont été évaluées à 2,6 milliards de dollars en 2006. Cette année-là, les recettes du secteur de la volaille et des oeufs ont compté pour 7,0 p. 100 des recettes agricoles totales au Canada, une baisse de 0,1 point de pourcentage par rapport à 2005.

L'importation de produits de volailles et d'oeufs est régie par le ministère des Affaires étrangères et du Commerce international en vertu d'un régime de contingent tarifaire. De plus, il existe un programme d'importation de produits destinés à la réexportation pour les produits de volaille et d'oeufs. La valeur des importations totales de poulet a augmenté de 4,3 p. 100 en 2006, passant de 350,8 millions à 366,1 millions de dollars. En 2006, les importations totales d'oeufs, d'oeufs d'incubation de poulet à chair et de dindons étaient évaluées à 28,7 millions, à 30,0 millions et à 32,2 millions de dollars respectivement. La valeur des importations totales d'oeufs et de produits d'oeufs, d'oeufs d'incubation et de dindons a chuté de 18,0 p. 100, 11,2 p. 100 et de 29,4 p. 100 respectivement au cours de l'année.

En 2006, la valeur des exportations canadiennes de poulets a augmenté de 1,2 p. 100 pour atteindre 185,9 millions de dollars. Les exportations de dindons, d'oeufs et de produits d'oeufs ont quant à elles diminuées de 11,1 p. 100 et de 11,0 p. 100 respectivement pour atteindre 26,7 millions et 27,0 millions de dollars (page 8). Les États-Unis ont été le plus important acheteur de produits de poulet et de dindon, se procurant 75,4 p. 100 et 51,3 p. 100 respectivement de la valeur des exportations canadiennes de poulet et de dindon. Le Japon, quant à lui, a été le plus important acheteur de produits d'oeufs, se procurant 37,8 p. 100 des exportations canadiennes de ce produit.

La consommation de poulet au Canada a continué d'augmenter légèrement en 2006, alors que la consommation d'oeufs et de dindon est demeurée stable, atteignant des niveaux équivalents à ceux des cinq dernières années. La consommation de poulet par personne a augmenté de façon constante au cours des quatre dernières années pour atteindre 31,8 kg en 2006, comparativement à 30,7 kg en 2002. La consommation de dindon et d'oeufs de table et de produits d'oeufs par personne a été respectivement de 4,4 kg et de 15,6 douzaines. La consommation de boeuf, un produit carné concurrentiel, décline lentement depuis les cinq dernières années à l'exception de 2004, alors que la consommation de porc a faibli de 4.5 kg par personne au cours des quatre dernières années.

L'indice des prix à la consommation (IPC) pour « tous les aliments » augmente constamment depuis ces dernières années (page 10), il a augmenté de 2,4 p. 100 en 2006. Cependant, le niveau des prix des produits de poulet et de dindon est demeuré stable durant l'année. Si l'on compare à 2005, l'IPC pour les produits d'oeuf a augmenté de 2,6 p. 100, alors que celui du poulet a augmenté de 0,4 p. 100 et celui du dindon a faibli de 0,3 p. 100. L'IPC pour les produits concurrentiels a augmenté de 0,1 p. 100 pour le boeuf alors qu'il a décliné de 5,1 p. 100 dans une seule année pour le porc.

Number of Poultry and Egg Producers - 2006
Nombre de producteurs de volaille et d'oeufs - 2006

Prov	Chicken Poulet	Turkey Dindon	Eggs Oeufs	Broiler Hatching Eggs Oeufs d'incubation de poulet à chair	Total
BC	318	64	126	57	565
AB	310	51	167	36	564
NT	-	-	1	-	1
SK	93	15	64	10	182
MB	117	64	168	28	377
ON	1,075	186	359	84	1,704
QC	747	135	105	41	1,028
NB	35	18	17	4	74
NS	82	24	23	4	133
PE	7	-	12	-	19
NL	8	-	11	-	19
Canada	2,792 ▲	557 ▲	1,053 ▼	264 ▼	4,666 ▼

▼▲: denotes an increase/decrease from last year's value • indique une augmentation/diminution comparativement à l'année dernière
Source: 4 national marketing agencies • les quatre offices canadiens de commercialisation.

Hatcheries, Processing Plants and Grading Stations
Couvoirs, usines de transformation et postes de classement

Prov	*Poultry/Volaille*		*Eggs/Oeufs*		
	Hatcheries *Couvoirs*	*Processing Plants* *Établissements de transformation*	*Egg Stock Hatcheries* *Couvoirs de type ponte*	*Grading Stations* *Postes de classement*	*Egg Processing* *Transformation d'oeufs*
BC	8	22	2	29	1
AB	8	15	7	43	2
NT and/et YT	0	0	0	1	0
SK	4	3	2	19	0
MB	8	5	3	28	2
ON	21	69	8	74	8
QC	14	82	5	27	3
NB	2	1	3	14	0
NS	2	4	1	15	0
PE	0	0	0	5	0
NL	1	1	0	6	0
Canada	68	202	31	261	16

All of the above establishments are federally registered facilities. • Tous les établissements ci-dessus sont enregistrés auprès du gouvernement fédéral

Source: Agriculture and Agri-Food Canada, National Farm Products Council
: Agriculture et Agroalimentaire Canada, Conseil national des produits agricoles

Production by Province and Territory - 2006
Production par province et territoire - 2006

Prov	Chicken Poulet (000 kg)	Turkey Dindon (000 kg)	Eggs Oeufs (000 dozen)/ (000 douzaines)	Broiler Hatching Eggs Oeufs d'incubation de poulet à chair (000 eggs)/ (000 oeufs)
BC	146,593	19,404	62,398	103,611
AB	85,805	13,054	43,956	70,769
NT	-	-	1,147	-
SK	37,968	5,255	21,915	24,447
MB	40,473	10,621	56,902	32,522
ON	321,321	74,627	200,825	196,221
QC	265,824	32,962	89,526	179,281
NB	26,432	2,865	11,251	58,366 *
NS	32,941	3,787	17,566	- *
PE	3,472	-	3,139	-
NL	12,820	-	8,059	-
Canada	973,649 ▼	162,575 ▲	516,684 ▲	665,218 ▼

* For broiler hatching eggs, production for NB and NS is shown under NB

* Pour les oeufs d'incubation de poulet à chair, la production de la N.-É. est regroupée avec celle du N.-B.

▼▲: denotes an increase/decrease from last year's value • indique une augmentation/diminution comparativement à l'année dernière

Source: 4 national marketing agencies • les quatre offices canadiens de commercialisation.

Farm Cash Receipts (FCR) - 2006
Recettes monétaires agricoles (RMA) - 2006

($000 000)

Prov	Chicken Poulet	Eggs Oeufs	Turkey Dindon	Broiler Hatching Eggs Oeufs d'incubation de poulet à chair	Total	Poultry and Egg as a % of Total FCR Volaille et oeufs en % des RMA totales
BC	259.8	67.6	31.9	30.4	389.7	16.6
AB	138.0	44.3	23.8	21.5	227.7	2.9
SK	56.7	20.9	9.7	7.4	94.7	1.4
MB	63.0	59.8	18.0	9.9	150.7	4.1
ON	495.4	213.5	127.3	54.0	890.2	10.0
QC	409.5	98.1	56.4	49.7	613.8	9.8
NB	43.2	15.7	4.7	16.1 *	80	17.7
NS	53.4	24.7	6.4	x *	85	18.7
PE	x	3.7	x	x	4	1.0
NL	x	12.1	x	x	12	12.6
Canada	**1,545.2 ▼**	**560.5 ▲**	**278.3 ▲**	**189.0 ▲**	**2,573.1 ▼**	**7.0**

* NB and NS numbers combined due to confidentiality • Les chiffres de N.-B. et de la N.-E. sont regroupés pour en protéger la confidentialité

▼▲: denotes an increase/decrease from last year's value • indique une augmentation/diminution comparativement à l'année dernière

Farm cash receipts measure the gross revenue of farm businesses in current dollars. They include sales of crops and livestock products (except sales between farms in the same province) and program payments. Receipts are recorded when the money is paid to farmers before any expenses are paid.

Les recettes monétaires agricoles mesurent le revenu brut des exploitations agricoles en dollars courants. Elles comprennent les ventes de productions végétales et animales (sauf les ventes entre les exploitations agricoles d'une même province) et les paiements de programme. Les recettes sont comptabilisées lorsque l'argent est versé aux agriculteurs, avant déduction des dépenses.

Notes: Statistics Canada does not publish FCR for the NT • Remarque : Statistique Canada ne publie pas les RMA des T.N.-O.

Source: Statistics Canada except for hatching eggs where FCR are calculated by CBHEMA

Statistique Canada, sauf pour le segment des oeufs d'incubation de poulet à chair dont les RMA proviennent de l'OCCOIPC

Value of Exports and Imports
Valeur des exportations et des importations
($000 000)

	Chicken Poulet		Turkey Dindon		Eggs and Egg Products Oeufs et produits d'oeufs		Broiler Hatching Eggs & Chicks Oeufs d'incubation de poulet de chair et poussins de type chair
	Exports Export.	*Imports Import.*	*Exports Export.*	*Imports Import.*	*Exports Export.*	*Imports Import.*	*Imports Import.*
2006	185.9	366.1	26.7	32.2	27.0	28.7	30.0
2005	183.6	350.8	30.1	45.6	30.4	35.0	33.7
2004	168.9	427.6	21.5	34.1	40.4	59.4	37.9
2003	143.3	338.6	16.7	24.9	43.0	37.6	28.4
2002	151.6	356.5	17.1	28.4	42.1	34.9	37.0

Note: Exports for broiler hatching eggs are minimal • Note: Les exportations d'œufs d'incubation de poulet à chair sont minimes.

Source: Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Per Capita Consumption
Consommation par personne

	Chicken Poulet (kg)	Turkey Dindon (kg)	Beef Boeuf (kg)	Pork Porc (kg)	Table Eggs & Egg Products Oeufs de consommation et produits d'oeufs (dozens/douzaines)
2006	31.8	4.4	31.7	23.3	15.6
2005	31.4	4.5	31.1	23.0	15.6
2004	31.1	4.4	30.7	26.6	15.2
2003	30.1	4.1	31.8	25.1	15.6
2002	30.7	4.3	30.5	27.8	15.4

Source : Statistics Canada • Statistique Canada

Consumer Price Index (1992=100)
Indice des prix à la consommation (1992=100)

	Chicken Poulet	*Turkey Dindon*	*Eggs Oeufs*	*Beef Boeuf*	*Pork Porc*	*All Foods Tous les aliments*
2006	133.8	142.3	149.9	141.1	119.9	131.0
2005	133.3	142.7	146.1	141.0	126.4	128.0
2004	133.1	135.5	144.3	138.4	125.7	124.9
2003	123.6	131.7	140.4	133.8	118.9	122.4
2002	116.7	131.4	133.9	132.8	118.8	120.3

Source : Statistics Canada • Statistique Canada

Statistics Canada defines the Consumer Price Index (CPI) as an indicator of the changes in consumer prices experienced by Canadians. It is obtained by comparing, through time, the cost of a fixed basket of goods purchased by Canadian consumers in a particular year. For example, the price for all foods in 2006 was 31.0% higher than it was in 1992.

Statistique Canada définit l'indice des prix à la consommation (IPC) comme un indicateur des changements dans les prix à la consommation payés par les Canadiens. Pour obtenir ces changements, on compare, durant certaines périodes de temps, le coût que doivent verser les consommateurs canadiens pour un même panier de biens. Par exemple, le prix pour tous les aliments en 2006 était de 31,0 % supérieur à celui de 1992.

Tariff Rate Quotas (TRQs)
Contingents Tarifaires

PRODUCT	WTO Agreement Accord OMC	NAFTA Agreement Accord ALENA	2006 TRQ/ 2006 Contingent Tarifaire	PRODUIT
Hatching Eggs & Chicks	95.4 Million eggs / millions d'oeufs	21.1% of anticipated current year's production / de la production prévue pour l'année en cours	115.2 Egg equivalent, millions / millions équivalent oeufs	Oeufs d'incubation et poussins
Chicken	39.9 Million kgs eviscerated / millions de kg, éviscérés	7.5% of previous year's production / de la production de l'année précédente	74.6 Million kgs eviscerated / millions de kg, éviscérés	Poulet
Turkey	5.6 Million kgs eviscerated / millions de kg, éviscérés	3.5% of anticipated current year's production / de la production prévue pour l'année en cours	5.4 Million kgs eviscerated / millions de kg, éviscérés	Dindon et dinde
Egg & Egg products	21.4 Million Dozen / millions de douzaines	2.988% of previous year's production / de la production de l'année précédente	15.8 Million Dozen / millions de douzaines	Oeufs et produit dérivés

Source: Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Broiler Hatching Eggs - 2006 Hightlights

Canadian production of hatching eggs was 665.2 million eggs in 2006, this represents a 1.4% decline from the 2005 production level. Despite the decline, British Columbia recorded a 16.1% increase in the number of hatching eggs produced, from 89.3 million to 103.6 million in 2006. This is largely because British Columbia returned to full production capacity in 2006 after having been slowed down by Avian Influenza in 2004 and 2005. The Western region of Canada produced 4.3% more hatching eggs, the Central region produced 4.9% fewer hatching eggs and the Eastern region produced 0.9% more eggs in 2006 than in 2005. The Western, Central and Eastern regions of Canada produced 34.8%, 56.4% and 8.8% of Canada's hatching eggs respectively.

Canadian broiler hatching egg producers collected $189.0 million in agricultural receipts- as calculated by the Canadian Broiler Hatching Egg Marketing Agency (CBHEMA). The Western, Central and Eastern regions of Canada collected 36.7%, 54.9% and 8.5% of the total respectively. The regional distribution of agricultural receipts has shifted slightly since 2001– the Western share is up 2.2 percentage points from 34.4%, the Central share is down 2.6 percentage points from 57.4% and the Eastern share is up 0.3 percentage points from 8.2%. Agricultural receipts from broiler hatching eggs were down 7.9% from the 2001 level.

Oeufs d'incubation de poulet à chair - Points saillants pour 2006

La production canadienne d'oeufs d'incubation a été de 665,2 millions d'oeufs en 2006, représentant une baisse de 1,4 p. 100 par rapport à la production de 2005. Malgré ce déclin, la Colombie-Britannique a enregistré une augmentation de 16,1 p. 100 de la production d'oeufs d'incubation, passant de 89,3 millions à 103,6 millions en 2006. Cette augmentation est attribuable au fait que la Colombie-Britannique a repris sa pleine capacité de production en 2006, après avoir subi un recul en 2004 et 2005 à la suite de la grippe aviaire. En 2006, la région de l'Ouest du Canada a produit 4,3 p. 100 de plus d'oeufs d'incubation, alors que la région du Centre en a produit 4,9 p. 100 de moins et la région de l'Est, 0,9 p. 100 de plus qu'en 2005. Les régions de l'Ouest, du Centre et de l'Est ont produit respectivement 34,8 p. 100, 56,4 p. 100 et 8,8 p. 100 des oeufs d'incubation du Canada.

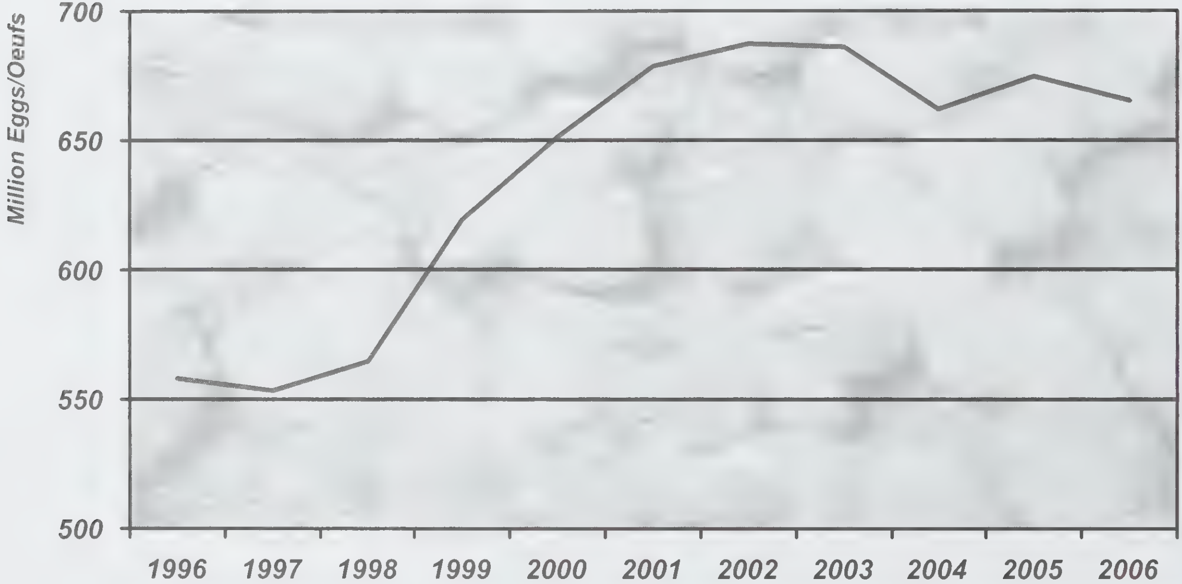
Les producteurs canadiens d'oeufs d'incubation de poulet à chair ont amassé 189,0 millions de dollars en RMA – tel que calculé par l'Office canadien de commercialisation des oeufs d'incubation de poulet à chair (OCCOIPC). Les régions de l'Ouest, du Centre et de l'Est du Canada ont recueilli 36,7 p. 100, 54,9 p. 100 et 8,5 p. 100 respectivement des RMA totales. La répartition régionale des RMA a légèrement changé depuis 2001 : la part de l'Ouest, qui était de 34,4 p. 100, a augmenté de 2,2 points de pourcentage, celle du Centre, à 57,4 p. 100, a diminué de 2,6 points de pourcentage, alors que la part de l'Est, à 8,2 p. 100, a augmenté de 0,3 point de pourcentage. Les recettes monétaires agricoles pour les oeufs d'incubation à chair sont en baisse de 7,9 p. 100 par rapport à 2001.

Broiler Hatching Eggs / Oeufs d'incubation de poulet à chair

Highlights / Points saillants

	2006	2005	2004	2003	2002
Number of Producers Nombre de producteurs	264	270	276	281	291
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	189.0	188.3	198.7	205.7	206.5
Production (000 000 eggs) Production (000 000 oeufs)	665.2	674.6	662.1	686.2	687.4
Imports - Broiler Hatching Eggs and Chicks (000 000 eggs) Importations - Oeufs d'incubation de poulets de chair et poussins de type chair (000 000 oeufs)	147.7	157.3	165.4	135.3	157.2

Broiler Hatching Egg Production
Production d'oeufs d'incubation de poulet à chair
1996 - 2006



Source : CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Broiler Hatching Egg Production
Production d'oeufs d'incubation de poulet à chair

	2006 Production	2005 Production	2006/2005 Change Changement	2006 % Canadian Total % du total canadien
Province/Region	*(000) (eggs/oeufs)*	*(000) (eggs/oeufs)*	%	
BC	103,611	89,275	16.1	15.6
AB	70,769	75,277	-6.0	10.6
SK	24,447	25,426	-3.8	3.7
MB	32,522	31,792	2.3	4.9
West/Ouest	***231,349***	***221,770***	***4.3***	***34.8***
ON	196,221	207,473	-5.4	29.5
QC	179,281	187,521	-4.4	27.0
Central/Centre	***375,502***	***394,994***	***-4.9***	***56.4***
NB and/et NS*	58,366	57,833	0.9	8.8
East/Est	***58,366***	***57,833***	***0.9***	***8.8***
Canada	***665,218***	***674,597***	***-1.4***	***100.0***

* combined due to confidentiality • chiffres regroupés pour confidentialité

Source : CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Broiler Hatching Egg Farm Cash Receipts (FCR) - 2006
Recettes monétaires agricoles (RMA) - Oeufs d'incubation de poulet à chair - 2006

	Broiler Hatching Eggs FCR RMA d'oeufs d'incubation de poulet à chair ($000)		*% Canadian Total % du total canadien*	
Province/Region	*2006*	*2001*	*2006*	*2001*
BC	30,403	34,527	16.1	16.8
AB	21,538	22,856	11.4	11.1
SK	7,442	5,190	3.9	2.5
MB	9,902	8,045	5.2	3.9
West/Ouest	***69,286***	***70,618***	***36.7***	***34.4***
ON	53,973	61,985	28.6	30.2
QC	49,714	55,863	26.3	27.2
Central/Centre	***103,687***	***117,848***	***54.9***	***57.4***
NB and/et NS*	16,054	16,781	8.5	8.2
East/Est	***16,054***	***16,781***	***8.5***	***8.2***
Canada	***189,027***	***205,247***	***100***	***100***

* combined due to confidentiality • chiffres regroupés pour confidentialité

Source : CBHEMA • OCCOIPC

Imports of Broiler Hatching Eggs and Chicks *
Importations d'oeufs d'incubation de poulets de chair et poussins de type chair *

Province/Region	*2006* *(000)* *(eggs/oeufs)*	*2005* *(000)* *(eggs/oeufs)*	*2006/2005* *Change* *Changement* *%*
BC	24,588	49,112	-49.9
AB	6,662	5,239	27.2
SK	7,208	3,353	115.0
MB	9,245	7,865	17.6
West/Ouest	***47,703***	***65,568***	***-27.2***
ON	46,895	48,121	-2.5
QC	51,149	40,498	26.3
Central/Centre	***98,043***	***88,620***	***10.6***
NB and/et NS **	1,929	3,113	-38.0
East/Est	***1,929***	***3,113***	***-38.0***
Canada	***147,676***	***157,300***	***-6.1***

* 1 chick = 1.27 eggs • 1 poussin = 1,27 oeufs

** combined due to confidentiality • chiffres regroupés pour confidentialité

Source : CBHEMA and Agriculture and Agri-Food Canada • OCCOIPC et Agriculture et Agroalimentaire Canada

Chicken - 2006 Highlights

Canada has experienced a decline in chicken production of 0.8% between 2005 and 2006, from 981.1 million kg to 973.6 million kg. Even though the production decline is distributed across the Western, Central and Eastern regions, production in Saskatchewan has increased by 16.7% over the same period. The Western, Central and Eastern regions accounted for 31.9%, 60.3% and 7.8% of Canadian chicken production respectively. Although the allocated production and the actual production are usually very close; the actual production volume has exceeded the allocation by 0.5% in 2006.

Canada imported 20.5% more chicken by volume in 2006 than in 2005. The increase is explained by greater imports of chicken breasts, chicken wings and further processed chicken increasing by 74.3%, 72.7% and 18.3% respectively.

Canadian chicken exports increased both in dollar value and in volume terms. Canadian chicken exports increased by 1.2% in value and by 7.4% in volume. In 2006, the United States purchased 38.0% of Canadian's chicken exports in volume and 75.4% in dollar value. South Africa and Hong Kong are the next two largest purchasers of Canadian chicken.

Canadian chicken producers collected $1.5 billion in farm cash receipts in 2006. The Western, Central and Eastern regions of Canada collected 33.5%, 58.6% and 8.0% of the FCR respectively. Chicken farm receipts accounted for a 4.2% share of total Canadian farm cash receipts in both 2006 and 2000 and the distribution of receipts among regions of Canada were similar in both 2006 and 2000.

2006 began with storage stocks of frozen chicken at 38.6 million kg, a quantity above any value attained in 2005. Stocks were depleted through the year down to 28.2 million kg, a quantity below any value attained in 2005.

Poulet - Points saillants pour 2006

Le Canada a connu un déclin au chapitre de la production de poulets d'environ 0,8 p. 100 entre 2005 et 2006, passant de 981,1 millions à 973,6 millions de kg. Bien que la baisse soit répartie dans les régions de l'Ouest, du Centre et de l'Est, la production de la Saskatchewan a augmenté de 16,7 p. 100 au cours de la même période. Ces régions représentent 31,9 p. 100, 60,3 p. 100 et 7,8 p. 100 respectivement de la production de poulet. En général, la production réelle correspond sensiblement aux quotas de production; toutefois, en 2006, le volume réelle de production a dépassé les quotas de production de 0,5 p. 100.

En 2006, le Canada a importé 20,5 p. 100 de poulet de plus qu'en 2005 au chapitre du volume. Cette augmentation s'explique par le fait que les importations de poitrines, d'ailes et de produits surtransformés ont été plus importantes, augmentant de 74,3 p. 100, de 72,7 p. 100 et de 18,3 p. 100 respectivement.

Les exportations de poulet canadien ont augmenté, tant au chapitre de la valeur (1,2 p. 100) que du volume (7,4 p. 100). En 2006, les États-Unis ont acheté 38,0 p. 100, en volume, et 75,4 p. 100, en valeur, du poulet canadien. L'Afrique du Sud et Hong Kong sont les deux plus gros acheteurs de poulet canadien après les États-Unis.

En 2006, les producteurs de poulet canadien ont enregistré des recettes monétaires agricoles de 1,5 milliard de dollars. Les régions de l'Ouest, du Centre et de l'Est ont recueilli 33,5 p. 100, 58,6 p. 100 et 8,0 p. 100 respectivement des RMA. Les recettes agricoles découlant de la production de poulet représentent 4,2 p. 100 des RMA totales et les RMA se répartissent de façon similaire entre les différentes régions du Canada tant en 2006 qu'en 2000.

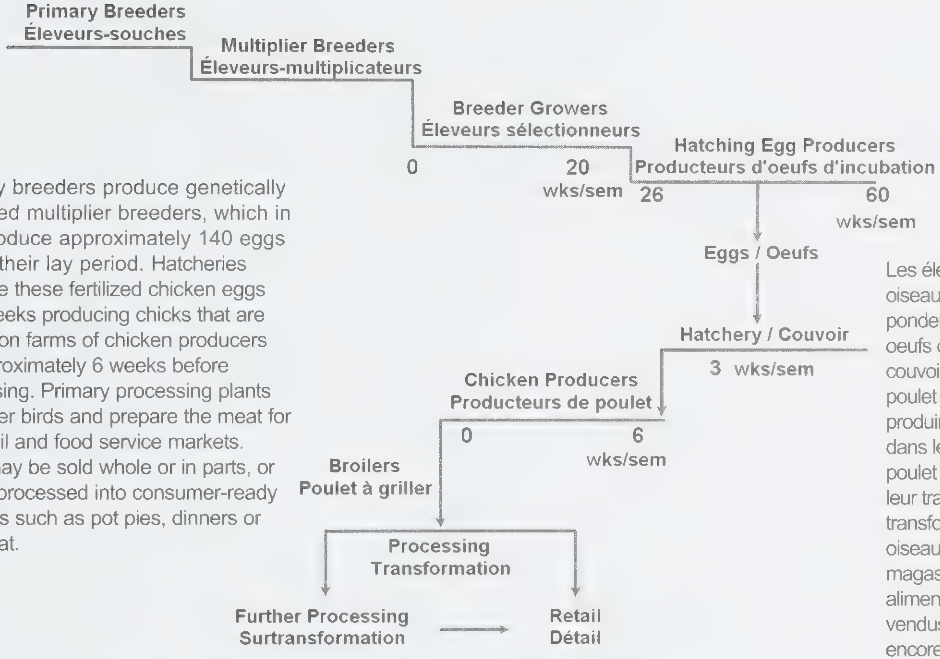
Les stocks de poulet surgelé en entrepôt étaient de 38,6 millions de kg au début de 2006, un sommet par rapport aux valeurs obtenues en 2005. Les stocks ont diminué au cours de l'année pour atteindre 28,2 millions de kg à la fin de 2006, soit une quantité inférieure à toute valeur obtenue en 2005.

Chicken / Poulet

Highlights / Points saillants

	2006	2005	2004	2003	2002
Number of Producers Nombre de producteurs	2,792	2,786	2,787	2,808	2,851
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	1,545.2	1,615.2	1,579.7	1,528.4	1,452.9
Production (000 000 kg) Production (000 000 kg)	973.6	981.1	946.2	934.5	939.0
Per Capita Consumption (kg) Consommation par personne (kg)	31.8	31.4	31.1	30.1	30.7
Consumer Price Index (1992=100) Indice des prix à la consommation (1992=100)	133.8	133.3	133.1	123.6	116.7
Exports ($000 000) Exportations (000 000 $)	185.9	183.6	168.9	143.3	151.6
Imports ($000 000) Importations (000 000 $)	366.1	350.8	427.6	338.6	356.5
Storage Stocks on December 31 (000 kg) Stocks en entrepôt au 31 décembre (000 kg)	28,219	38,568	33,069	23,567	28,947

Chicken Production Timeline
Cycle de production du poulet

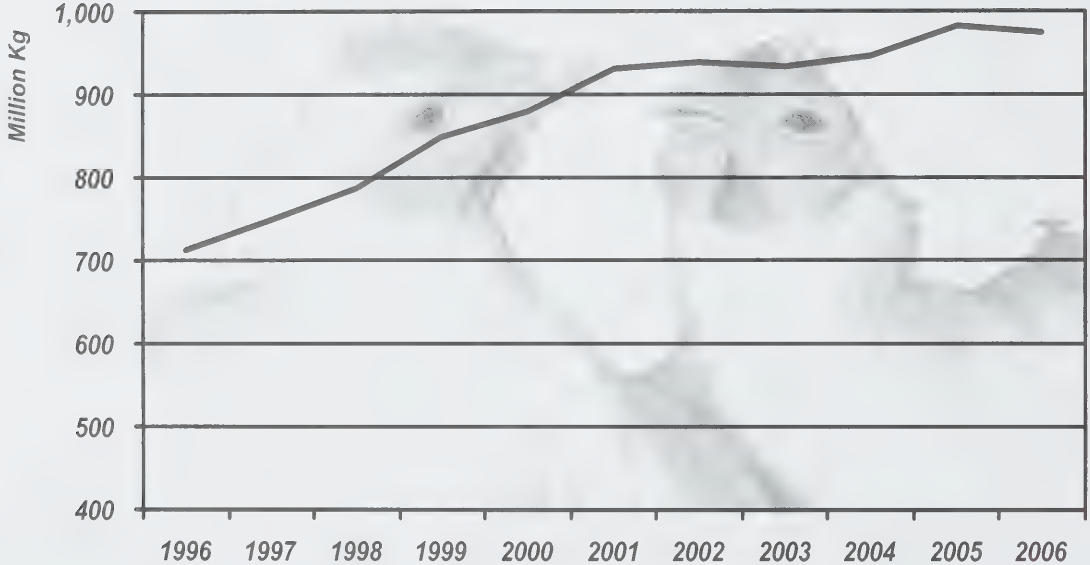


Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 140 eggs during their lay period. Hatcheries incubate these fertilized chicken eggs for 3 weeks producing chicks that are placed on farms of chicken producers for approximately 6 weeks before processing. Primary processing plants slaughter birds and prepare the meat for the retail and food service markets. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat.

Les éleveurs-souches produisent des oiseaux génétiquement améliorés, qui pondent ultérieurement environ 140 oeufs durant leur période de ponte. Les couvoirs incubent ces oeufs fertilisés de poulet pendant 3 semaines afin de produire les poussins qui seront placés dans les poulaillers des producteurs de poulet durant environ 6 semaines avant leur transformation. Les usines de transformation primaire abattent ces oiseaux et préparent la viande pour les magasins de détail et les services alimentaires. Les oiseaux peuvent être vendus entiers ou en découpes, ou encore surtransformés en produits prêts à être consommés, comme des pâtés congelés, des repas congelés ou de la charcuterie.

Source : National Farm Products Council • Conseil national des produits agricoles

Chicken Production
Production de poulet
1996 - 2006



Source : CFC • PPC

Chicken Production
Production de poulet

	2006 Production	2005 Production	2006/2005 Change Changement	2006 % Canadian Total % du total canadien
Province/Region	*(000 kg)*	*(000 kg)*	*%*	*%*
BC	146,593	154,446	-5.1	15.1
AB	85,805	86,681	-1.0	8.8
SK	37,968	32,525	16.7	3.9
MB	40,473	40,463	0.0	4.2
West/Ouest	***310,839***	***314,115***	***-1.0***	***31.9***
ON	321,321	325,143	-1.2	33.0
QC	265,824	264,936	0.3	27.3
Central/Centre	***587,145***	***590,079***	***-0.5***	***60.3***
NB	26,432	26,754	-1.2	2.7
NS	32,941	33,311	-1.1	3.4
PE	3,472	3,657	-5.0	0.4
NL	12,820	13,195	-2.8	1.3
East/Est	***75,665***	***76,916***	***-1.6***	***7.8***
Canada	***973,649***	***981,110***	***-0.8***	***100.0***

Source : CFC • PPC

Chicken Farm Cash Receipts (FCR) - 2006
Recettes monétaires agricoles (RMA) - Poulet - 2006

	Chicken FCR / RMA ($000)		% Canadian Total / % du total canadien		Chicken FCR as a % of Total FCR / RMA du poulet	
Province/Region	**2006**	**2000**	**2006**	**2000**	**2006**	**2000**
BC	259,767	217,014	16.8	15.9	11.1	10.6
AB	137,995	117,954	8.9	8.6	1.8	1.6
SK	56,686	37,677	3.7	2.8	0.9	0.7
MB	62,980	56,503	4.1	4.1	1.7	1.8
West/Ouest	***517,428***	***429,148***	***33.5***	***31.4***	***2.5***	***2.3***
ON	495,414	440,037	32.1	32.2	5.5	5.6
QC	409,524	383,748	26.5	28 0	6.6	7.1
Central/Centre	***904,938***	***823,785***	***58.6***	***60.2***	***6.0***	***6.2***
NB	43,238	40,187	2 8	2.9	9.6	10.9
NS	53,399	50,030	3.5	3.7	11.8	12.1
PE and/et NL	26,230	24,993	1.7	1.8	5.5	6.3
East/Est	***122,867***	***115,210***	***8.0***	***8.4***	***8.9***	***9.8***
Canada	***1,545,233***	***1,368,143***	***100***	***100***	***4.2***	***4.2***

Source : Statistics Canada • Statistique Canada

Chicken Exports / Exportations de poulet

	2006 ($000 000)	2006 (000 000 kg)	2005 ($000 000)	2005 (000 000 kg)	
United States	140.1 ▲	41.8 ▲	118.4	31.2	États-Unis
South Africa	14.1 ▲	22.8 ▲	12.4	13.9	Afrique du Sud
Hong Kong	7.3 ▲	9.4 ▲	6.6	8.9	Philippines
Philippines	5.8 ▼	8.9 ▼	10.6	11.8	Hong Kong
Macedonia	2.7 ▼	4.1 ▼	4.9	4.9	Macédoine
Others	15.8 ▼	25.4 ▼	30.8	30.1	Autres
Total	185.9 ▲	112.4 ▲	183.7	100.7	Total

▼▲: denotes an increase/decrease from last year's value • indique une augmentation/diminution comparativement à l'année dernière

Note Totals differ from highlight section due to the alternate source of the data • Les totaux diffèrent des points saillants à cause de l utilisation de sources de données différentes

Source : Industry Canada • Industrie Canada

Volume of Chicken Imports / Quantité de poulet importé

	2006 (000 000 kg)	2005 (000 000 kg)	2006/2005 Change Changement %	
Live (Evis. Wt.)	0.3	0.1	271.2	Vivant (Poids évisc.)
Whole Carcass	0.4	0.9	-55.6	Carcasse entière
Breasts	24.1	13.9	74.3	Poitrines
Legs and Other Parts	2.5	6.3	-59.4	Jambes et autres parties
Wings	28.3	16.4	72.7	Ailes
Boneless Parts	28.6	30.3	-5.5	Parties désossées
Cooked	13.2	12.2	7.6	Cuits
Others	9.8	8.7	12.3	Autres
Further Processed	21.9	18.5	18.3	Surtransformation
Total	**129.2**	**107.3**	**20.5**	**Total**

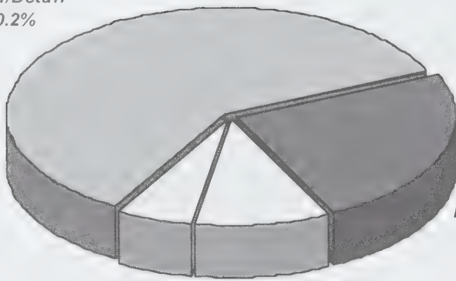
Includes quantities imported under the import for re-export program

Inclut les quantités importées en vertu du programme d'importation pour ré-exportation

Classification of parts has changed from last year's handbook • La classification des coupes de volaille a changé par rapport a celle dans le livret de donnes de l'annee derniere

Source : Agriculture and Agri-Food Canada, actual weight • Agriculture et Agroalimentaire Canada, poids réel

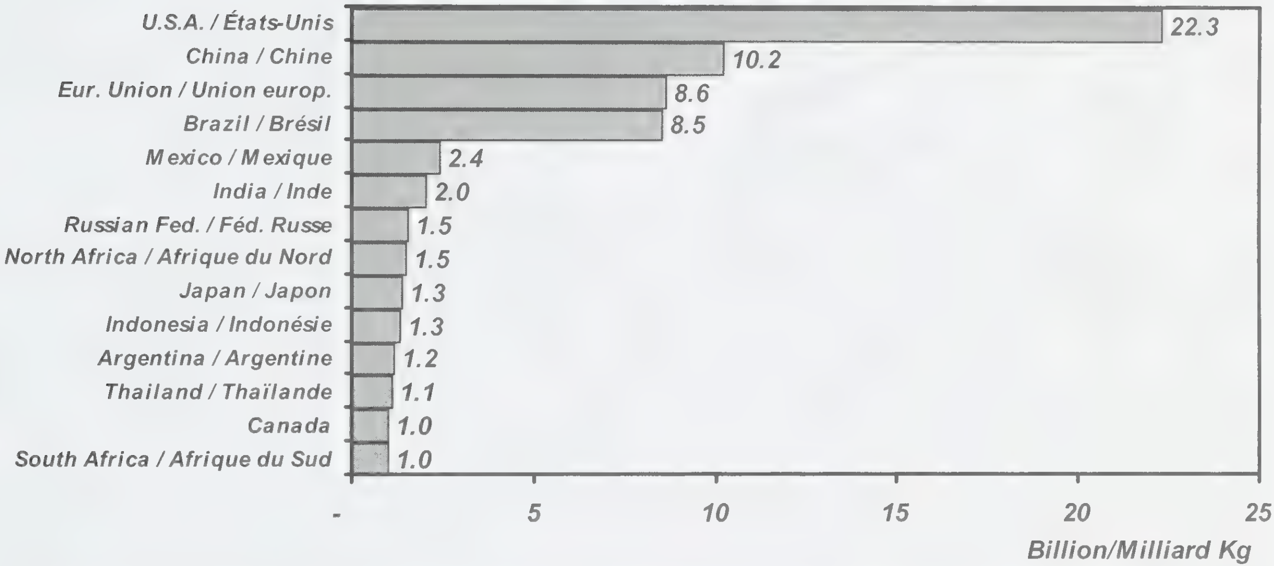
Chicken Consumption by Market Sector
Consommation de poulet par segment du marché



	(000 000 kg)				
	2006	2005	2004	2003	2002
Retail/ Détail	618	625	611	595	608
Fast Food/ Restauration rapide	248	231	221	213	211
Full Service Restaurants/ Restauration avec service complet	104	97	92	90	94
Hotel and Instutions/ Hôtels et institutions	56	55	54	53	54
Total	1,026	1,008	978	951	967

Source : Further Poultry Processors Association of Canada • Association canadienne des surtransformateurs de volailles

Major Chicken Meat Producing Countries
Principaux pays producteurs de viande de poulet
2006



Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

Turkey - 2006 Hightlights

Canadian turkey producers set a record in 2006 by producing 162.6 million kg of turkey, exceeding their previous year's production record of 154.8 million kg by 5.0%. Production in the Western, Central and Eastern regions of Canada increased by 2.1%, 6.3% and 6.7% respectively. Proportionally, the Western, Central and Eastern regions produced 29.7%, 66.2% and 4.1% of Canada's turkey.

Canada imported 22.7% less turkey by volume in 2006 than in 2005. The decline marks a return to more historically consistent importation levels, as 2005 imports of turkey were unusually high.

Canadian exports of turkey by value declined by 11.4% between 2005 and 2006. Despite the overall decrease in exports, the United States (Canada's largest purchaser of turkey) purchased $1.1 million more turkey in 2006 than in 2005 totalling $13.8 million and South Africa (Canada's second largest purchaser of turkey) purchased $1.0 million more turkey than in 2005 totalling $4.8 million.

Canadian turkey producers collected $278.3 million in farm cash receipts in 2006. The Western, Central and Eastern regions of Canada collected 30.0%, 66.0% and 4.0% of this total. Turkey farm cash receipts accounted for a 0.8% share of total Canadian farm cash receipts in both 2006 and 2000 and the distribution of receipts among regions of Canada were similar both in 2006 and 2000.

Dindon - Points saillants pour 2006

Les producteurs de dindon canadien ont établi un nouveau record en 2006 en produisant 162,6 millions de kg de dindon, dépassant de 5,0 p. 100 la production record de l'année précédente qui s'élevait à 154,8 millions de kg. La production des régions de l'Ouest, du Centre et de l'Est du Canada a augmenté respectivement de 2,1 p. 100, de 6,3 p. 100 et de 6,7 p. 100. La production de dindon au Canada se répartit de la façon suivante selon les régions : 29,7 p. 100 dans l'Ouest, 66,2 p. 100 au Centre et 4,1 p. 100 dans l'Est.

Le Canada a importé, en 2006, 22,7 p. 100 moins de dindon en volume qu'en 2005. Ce déclin marque un retour à des niveaux d'importation historiquement plus cohérents, car les importations de dindon de 2005 étaient extraordinairement élevées.

Le volume des exportations canadiennes de dindon a décliné de 11,4 p. 100 entre 2005 et 2006. Malgré les diminutions générales des exportations, les États-Unis (le plus important acheteur de dindon canadien) ont importé, en 2006, 1,1 millions de dollars de dindon de plus qu'en 2005, totalisant 13,8 millions de dollars. L'Afrique du Sud (deuxième importateur de dindon canadien) a quant à elle acheté pour 1,0 millions de dollars de dindon de plus qu'en 2005, totalisant des achats de 4,8 millions de dollars.

Les producteurs de dindon du Canada ont amassé 278,3 millions de dollars en recettes monétaires agricoles en 2006. Les régions de l'Ouest, du Centre et de l'Est représentaient respectivement 30,0 p. 100, 66,0 p. 100 et 4,0 p,. 100 de ce total. Les RMA pour le dindon ont représenté 0,8 p. 100 des RMA totales en 2006 et en 2000; la répartition des RMA entre les diverses régions du Canada était semblable en 2006 et en 2000.

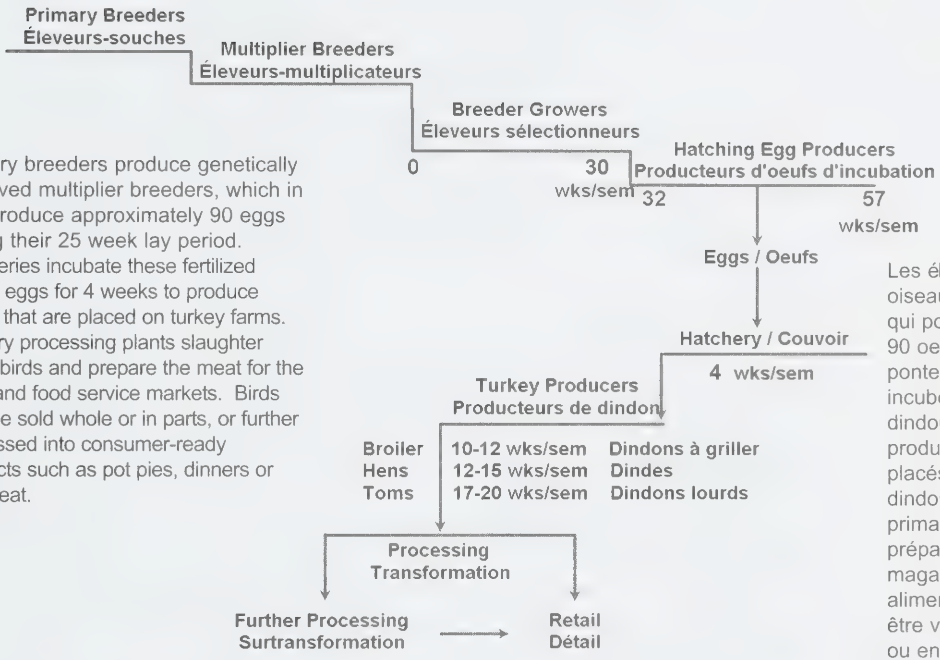
Turkey / Dindon

Highlights / Points saillants

	2006	2005	2004	2003	2002
Number of Producers Nombre de producteurs	557	543	549	550	556
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	278.3	271.5	267.8	262.6	258.8
Production (000 000 kg) Production (000 000 kg)	162.6	154.8	144.3	148.3	145.7
Per Capita Consumption (kg) Consommation par personne (kg)	4.4	4.5	4.4	4.1	4.3
Consumer Price Index (1992=100) Indice des prix à la consommation (1992=100)	142.3	142.7	135.5	131.7	131.4
Exports ($000 000) Exportations (000 000 $)	26.7	30.1	21.5	16.7	17.1
Imports ($000 000) Importations (000 000 $)	32.2	45.6	34.1	24.9	28.4
Storage Stocks on December 31 (000 kg) Stocks en entrepôt au 31 décembre (000 kg)	12,880	12,481	11,731	15,859	13,956

Turkey Production Timeline
Cycle de production du dindon

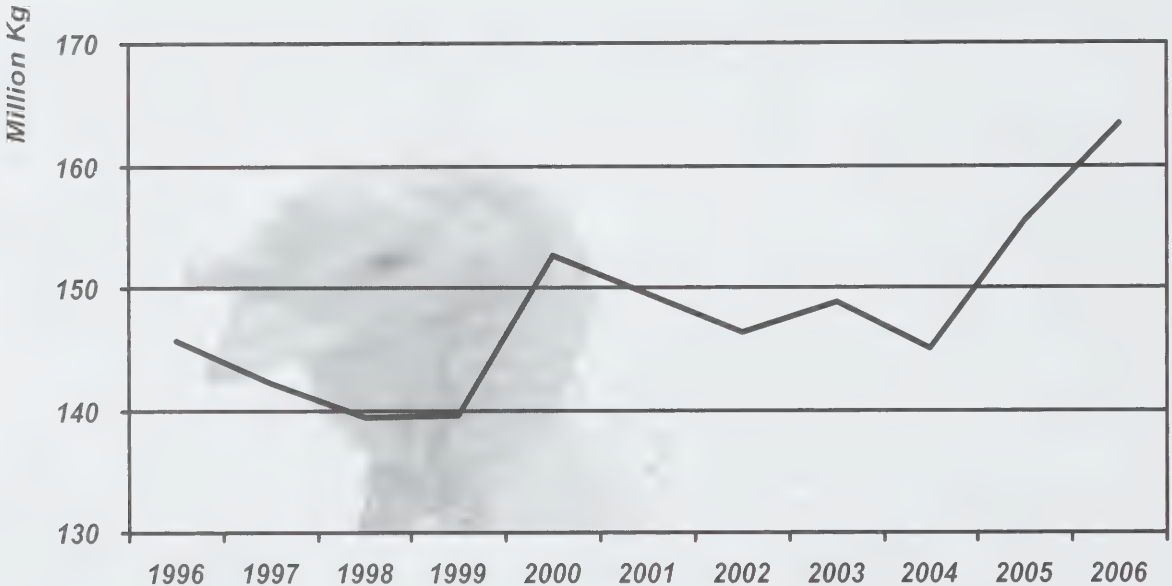
Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 90 eggs during their 25 week lay period. Hatcheries incubate these fertilized turkey eggs for 4 weeks to produce poults that are placed on turkey farms. Primary processing plants slaughter these birds and prepare the meat for the retail and food service markets. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat.



Source : National Farm Products Council • Conseil national des produits agricoles

Les éleveurs-souches produisent des oiseaux génétiquement améliorés, qui pondent ultérieurement environ 90 oeufs durant leur période de ponte de 25 semaines. Les couvoirs incubent ces oeufs fertilisés de dindon pendant 4 semaines afin de produire les dindonneaux qui seront placés dans les exploitations de dindon. Les usines de transformation primaire abattent ces oiseaux et préparent la viande pour les magasins de détail et les services alimentaires. Les oiseaux peuvent être vendus entiers ou en découpes, ou encore surtransformés en produits prêts à être consommés, comme des pâtés congelés, des repas congelés ou de la charcuterie.

Turkey Production
Production de dindon
1996 - 2006



Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Turkey Production
Production de dindon

	2006 Production	2005 Production	2006/2005 Change Changement	2006 % Canadian Total % du total canadien
Province/Region	*(000 kg)*	*(000 kg)*	%	%
BC	19,404	19,543	-0.7	11.9
AB	13,054	12,875	1.4	8.0
SK	5,255	4,419	18.9	3.2
MB	10,621	10,515	1.0	6.5
West/Ouest	***48,334***	***47,352***	***2.1***	***29.7***
ON	74,627	69,738	7.0	45.9
QC	32,962	31,508	4.6	20.3
Central/Centre	***107,589***	***101,246***	***6.3***	***66.2***
NB	2,865	2,693	6.4	1.8
NS	3,787	3,539	7.0	2.3
East/Est	***6,652***	***6,232***	***6.7***	***4.1***
Canada	***162,575***	***154,830***	***5.0***	***100.0***

Source : CTMA • OCCD

Turkey Farm Cash Receipts (FCR) - 2006
Recettes monétaires agricoles (RMA) - Dindon - 2006

	Turkey FCR RMA du dindon ($000)		*% Canadian Total % du total canadien*		*Turkey FCR as a % of Total FCR RMA du dindon en % des RMA totales*	
Province/Region	*2006*	*2000*	*2006*	*2000*	*2006*	*2000*
BC	31,932	30,305	11.5	11.5	1.4	1.5
AB	23,826	20,295	8.6	7.7	0.3	0.3
SK	9,662	9,454	3.5	3.6	0.1	0.2
MB	18,047	17,797	6.5	6.8	0.5	0.6
West/Ouest	***83,467***	***77,851***	***30.0***	***29.6***	***0.4***	***0.4***
ON	127,271	115,197	45.7	43.8	1.4	1.5
QC	56,437	59,385	20.3	22.6	0.9	1.1
Central/Centre	***183,708***	***174,582***	***66.0***	***66.3***	***1.2***	***1.3***
NB	4,669	4,154	1.7	1.6	1.0	1.1
NS	6,392	6,600	2.3	2.5	1.4	1.6
PE and/et NL	68	66	0.0	0.0	0.0	0.0
East/Est	***11,129***	***10,820***	***4.0***	***4.1***	***0.8***	***0.9***
Canada	***278,304***	***263,253***	***100***	***100***	***0.8***	***0.8***

Source : Statistics Canada • Statistique Canada

Turkey Exports

Exportations de dindon

	2006 ($000 000)	2005 ($000 000)	2006/2005 Change Changement %	
United States	13.8	12.6	9.1%	États-Unis
South Africa	4.8	3.9	25.9%	Afrique du Sud
Russia	1.3	3.2	-58.5%	Russie
Philippines	1.0	0.6	69.6%	Philippines
Bulgaria	0.8	3.8	-78.9%	Bulgarie
Others	5.1	6.2	-17.9%	Autres
Total	**26.8**	**30.3**	**-11.4%**	**Total**

Note Totals differ from highlight section due to the alternate source of the data • Les totaux différent des points saillants à cause de l utilisation de sources de données différentes

Source : Industry Canada • Industrie Canada

Volume of Turkey Imports

Quantité de dindon importé

	2006 (000 000 kg)	2005 (000 000 kg)	2006/2005 Change Changement %	
Live (Evis. Wt.)	-	-	-	Vivant (Poids évisc.)
Whole Carcass	0.1	0.3	-69.7	Carcasse entière
Breasts	0.1	0.1	-42.0	Poitrines
Legs and Other Parts	0.0	0.0	66.9	Jambes et autres parties
Wings	-	-	-	Ailes
Boneless Parts	3.1	6.0	-48.1	Parties désossées
Cooked	0.5	0.6	-4.0	Cuits
Further Processed	5.4	5.0	8.4	Surtransformation
Total	**9.2**	**11.9**	**-22.7**	**Total**

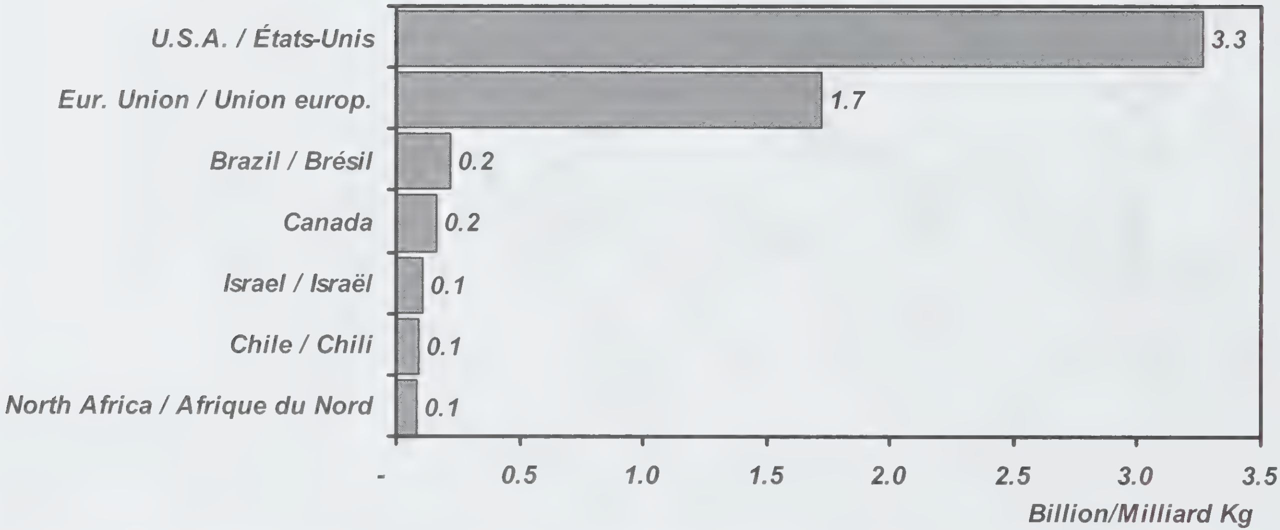
Includes quantities imported under the import for re-export program

Inclut les quantités importées en vertu du programme d'importation pour ré-exportation

Classification of poultry parts has changed from last year's handbook • La classification des coupes de volaille a changé par rapport a celle dans le livret de donnes de l'annee derniere

Source : Agriculture and Agri-Food Canada, actual weight • Agriculture et Agroalimentaire Canada, poids réel

Major Turkey Meat Producing Countries
Principaux pays producteurs de viande de dindon
2006



Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

NFPC CNPA

Notes

CNPA NFPC

Notes

Eggs - 2006 Highlights

Canadian egg production increased 1.8% from 507.8 million dozen to 516.7 million dozen (excluding eggs for processing) between 2005 and 2006. The year also marks British Columbia's return to full capacity production after widespread layer depopulation in 2004 due to Avian Influenza. Consequently, British Columbia's 2006 production level is 19.5% higher than its 2005 level and Canada's Western region's production is up 6.2% over the same time frame. Canada's Central and Eastern regions recorded small decreases in production levels of 0.5% and 1.2% respectively. The Western, Central and Eastern regions of Canada produced 36.1%, 56.2% and 7.7% of Canada's eggs.

Canada exported $27.0 million worth of eggs and egg products in 2006; this marks a decline of 11.0% from the 2005 total of $30.4 million. Japan is the largest purchaser of Canadian egg products. Japan purchased $10.1 million worth of Canadian egg products in 2006, $2.4 million less than in 2005.

Canadian egg producers collected $560.5 million in farm cash receipts throughout 2006. The Western, Central and Eastern regions of Canada collected 34.4%, 55.6% and 10.0% of this total. Farm cash receipts for eggs accounted for a 1.5% share of total Canadian farm cash receipts in 2006. The distribution of receipts among regions of Canada in 2006 was similar to the distribution in 2000.

Industrial product volumes refer to eggs produced in excess of local or provincial requirements for the table egg market. Nationally, industrial product volumes increased by 3.2% between 2005 and 2006 from 122.1 million dozen to 126.0 million dozen.

Oeufs - Points saillants pour 2006

La production d'oeufs canadiens a augmenté de 1,8 p. 100, passant de 507,8 millions à 516,7 millions de douzaines (excluant les oeufs destinés à la transformation) entre 2005 et 2006. L'année 2006 marque le retour de la Colombie-Britannique à sa pleine capacité de production après l'abattage en masse de pondeuses en 2004 en raison de la grippe aviaire. Par conséquent, la production de la Colombie-Britannique a été supérieure de 19,5 p. 100 en 2006 par rapport à 2005 et la production de l'Ouest a augmenté de 6,2 p. 100 au cours de la même période. Les régions du Centre et de l'Est du Canada ont enregistré des diminutions légères de production de 0,5 p. 100 et de 1,2 p. 100 respectivement. Les régions de l'Ouest, du Centre et de l'Est du Canada ont produit respectivement 36,1 p. 100, 56,2 p. 100 et 7,7 p. 100 des oeufs du Canada.

En 2006, le Canada a exporté 27,0 millions de dollars d'oeufs et de produits d'oeufs, soit une baisse de 11,0 p. 100 par rapport au total de 30,4 millions de dollars en 2005. Le Japon est le plus important acheteur de produits d'oeufs canadiens. Il a acheté pour 10,1 millions de dollars en produits d'oeufs canadiens en 2006, soit 2,4 millions de dollars de moins qu'en 2005.

Les producteurs d'oeufs canadiens ont réalisé des RMA de 560,5 millions de dollars en 2006, réparties entre les régions de l'Ouest, du Centre et de l'Est du Canada à 34,4 p. 100, à 55,6 p. 100 et à 10,0 p. 100 respectivement. Les RMA pour les oeufs ont compté pour 1,5 p. 100 des RMA totales canadiennes en 2006 et la répartition des RMA entre les différentes régions du Canada est demeurée semblable en 2006 et en 2000.

Le volume de produits industriels fait référence aux oeufs produits en excès de la demande des marchés locaux ou provinciaux des oeufs de table. À l'échelle nationale, les volumes de produits industriels ont augmenté de 3,2 p. 100 entre 2005 et 2006, passant de 122,1 millions à 126,0 millions de douzaines.

Eggs / Oeufs

Highlights / Points saillants

	2006	2005	2004	2003	2002
Number of Producers Nombre de producteurs	1,053	1,069	1,078	1,100	1,128
Farm Cash Receipts ($000 000) Recettes monétaires agricoles (000 000 $)	560.5	547.2	567.2	570.3	575.0
Production (000 000 dozen) Production (000 000 douzaine)	516.7	507.8	471.0	498.5	494.6
Per Capita Consumption (dozen) Consommation par personne (douzaine)	15.6	15.6	15.2	15.6	15.4
Consumer Price Index (1992=100) Indice des prix à la consommation (1992=100)	149.9	146.1	144.3	140.4	133.9
Exports ($000 000) Exportations (000 000 $)	27.0	30.4	40.4	43.0	42.1
Imports ($000 000) Importations (000 000 $)	28.7	35.0	59.4	37.6	34.9
Storage Stocks on December 31 (000 kg) Stocks en entrepôt au 31 décembre (000 kg)	11,085	10,876	12,226	8,690	10,740

Egg Production Timeline
Cycle de production d'oeufs

Les éleveurs-souches maintiennent et élargissent les races pures et mettent au point des races hybrides. Ils produisent des oeufs qui seront incubés pour obtenir les reproducteurs de multiplicateurs. Ces derniers produisent les oeufs qui, une fois incubés, donneront les poussins que les éleveurs de poulettes garderont jusqu'à 18 semaines. À 19 semaines, les poulettes sont placées dans les poulaillers des producteurs d'oeufs, où elles commencent à pondre des oeufs destinés au marché du détail ou à celui de la transformation. Les postes de classement d'oeufs préparent les oeufs destinés au marché de la consommation. Les usines de transformation d'oeufs (aussi appelées décoquilleurs ou casseries) transforment les oeufs en produits liquides ou déshydratés, qui sont destinés à la consommation, à des usages pharmaceutiques ou à des applications industrielles.

Primary Breeders
Éleveurs-souches

Chicks
Poussins

Multiplier Breeders
Éleveurs-multiplicateurs

Chicks
Poussins

Pullet Growers
Éleveurs de poulettes

0

18
wks/sem

Egg Producers
Producteurs d'oeufs

19

72
wks/sem

Table Eggs
Oeufs de consommation

Graders
Classificateurs

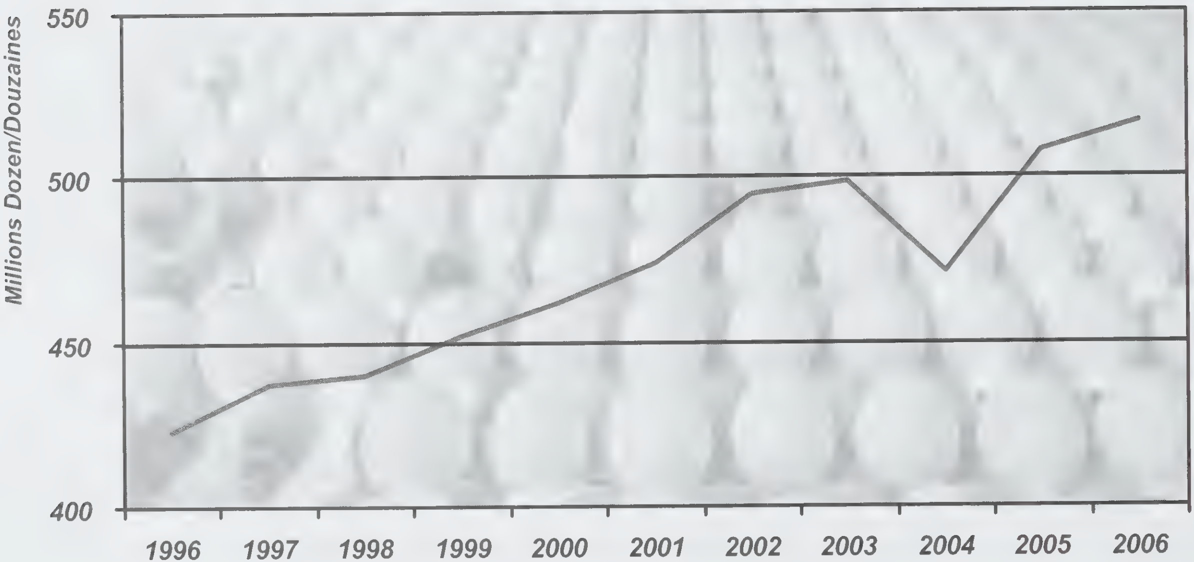
Processing
Transformation

Retail
Détail

Primary breeders maintain and expand pure bloodlines and develop cross-bred bloodlines. The eggs they produce are hatched into multiplier breeders. Multiplier breeders produce eggs which, when hatched, are grown to the age of 18 weeks by pullet growers. At 19 weeks, the pullets are placed in egg producers' barns where they begin to produce eggs for the retail and processed markets. Egg grading stations prepare eggs for the table market. Egg processing plants ("breakers") process eggs into liquid and dried form for consumer, pharmaceutical and industrial uses.

Source : National Farm Products Council • Conseil national des produits agricoles

Egg Production
Production d'oeufs
1996 - 2006



Source : CEMA • OCCO

Egg Production
Production d'oeufs

Province/Region	2006 Production (000 dz)	2005 Production (000 dz)	2006/2005 Change Changement %	2006 % Canadian Total % du total canadien %
BC	62,398	52,203	19.5	12.1
AB	43,956	43,407	1.3	8.5
SK	21,915	21,787	0.6	4.2
MB	56,902	56,503	0.7	11.0
NT	1,147	1,542	-25.6	0.2
West/Ouest	***186,319***	***175,441***	***6.2***	***36.1***
ON	200,825	201,793	-0.5	38.9
QC	89,526	90,027	-0.6	17.3
Central/Centre	***290,351***	***291,820***	***-0.5***	***56.2***
NB	11,251	10,662	5.5	2.2
NS	17,566	18,391	-4.5	3.4
PE	3,139	3,021	3.9	0.6
NL	8,059	8,419	-4.3	1.6
East/Est	***40,015***	***40,492***	***-1.2***	***7.7***
Canada	***516,684***	***507,754***	***1.8***	***100.0***

Note: Figures do not include eggs for processing • Figures n'incluent pas les oeufs cassés destinés à la transformation

Source : CEMA • OCCO

Egg Farm Cash Receipts (FCR) - 2006
Recettes monétaires agricoles (RMA) - Oeufs - 2006

	Eggs FCR *RMA des oeufs ($000)*		*% Canadian Total* *% du total canadien*		*Egg FCR as a % of Total FCR* *RMA des oeufs en % des RMA totales*	
Province/Region	***2006***	***2000***	***2006***	***2000***	***2006***	***2000***
BC	67,643	63,642	12.1	12.5	2.9	3.1
AB	44,320	37,034	7.9	7.2	0.6	0.5
SK	20,932	18,184	3.7	3.6	0.3	0.3
MB	59,780	59,876	10.7	11.7	1.6	1.9
West/Ouest	***192,675***	***178,736***	***34.4***	***35.0***	***0.9***	***1.0***
ON	213,511	196,968	38.1	38.5	2.4	2.5
QC	98,101	87,536	17.5	17.1	1.6	1.6
Central/Centre	***311,612***	***284,504***	***55.6***	***55.7***	***2.1***	***2.1***
NB	15,672	13,565	2.8	2.7	3.5	3.7
NS	24,735	21,615	4.4	4.2	5.5	5.2
PE	3,724	3,172	0.7	0.6	1.0	1.0
NL	12,112	9,460	2.2	1.9	12.6	12.6
East/Est	***56,243***	***47,812***	***10.0***	***9.4***	***4.1***	***4.0***
Canada	***560,530***	***511,052***	***100***	***100***	***1.5***	***1.6***

Source : Statistics Canada • Statistique Canada

Egg Product Exports - by Category
Produits d'oeufs exportés - par catégorie

	2006 ($000 000)	2006 (000 000 kg)	2005 ($000 000)	2005 (000 000 kg)	
Whole Egg					***Oeufs entiers***
Liquid/Frozen	0.6	0.4	0.9	0.6	**Liquides ou surgelés**
Dried	2.6	0.7	3.0	0.8	**Déshydratés**
Whole Egg Total	3.2 ▼	1.1 ▼	3.9	1.5	***Oeufs entiers total***
Egg Albumen					***Albumen***
Liquid/Frozen	1.9	2.2	1.6	2.1	**Liquide ou surgelé**
Dried	10.3	1.8	13.8	2.3	**Déshydraté**
Egg Albumen total	12.1 ▼	4.0 ▼	15.3	4.5	***Albumen total***
Egg Yolks					***Jaunes d'oeufs***
Liquid/Frozen	3.7	2.2	4.1	2.4	**Liquides ou surgelés**
Dried	7.9	2.7	6.8	2.6	**Déshydratés**
Egg Yolks Total	11.6 ▲	4.9 ▼	10.9	5.1	***Jaunes d'oeufs total***
Total	26.8 ▼	10.0 ▼	30.1	11.0	***Total***

Note : Exports of shell eggs are minimal • Les exportations d'oeufs en coquille sont minimes
▼▲: denotes an increase/decrease from last year's value • indique une augmentation/diminution comparativement a l'année dernière
Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Egg Product Exports
Produits d'oeufs exportés

Destination	*2006 ($000 000)*	*2005 ($000 000)*	*Destination*
Japan	10.1	12.6	*Japon*
United States	3.7	5.5	*États-Unis*
Germany	3.1	3.2	*Allemagne*
Others	9.9	9.0	*Autres*
Total	26.8	30.1	*Total*

Source : Industry Canada • Industrie Canada

Egg Product Imports - by Category
Produits d'oeufs importés - par catégorie

	2006 ($000 000)	2006 (000 000 kg)	2005 ($000 000)	2005 (000 000 kg)	
Whole Egg					*Oeufs entiers*
Liquid/Frozen	1.2	1.4	0.9	0.7	Liquides ou surgelés
Dried	1.9	1.0	1.1	0.5	Déshydratés
Whole Egg Total	3.1 ▲	2.4 ▲	1.9	1.3	*Oeufs entiers Total*
Egg Albumen					*Albumen*
Liquid/Frozen	3.9	6.2	3.6	6.1	Liquide ou surgelé
Dried	0.5	0.1	0.8	0.1	Déshydraté
Egg Albumen total	4.4 ▼	6.3 ▲	4.4	6.2	*Albumen Total*
Egg Yolks					*Jaunes d'oeufs*
Liquid/Frozen	1.1	0.7	1.9	1.3	Liquides ou surgelés
Dried	0.1	0.0	0.0	0.0	Déshydratés
Egg Yolks Total	1.2 ▼	0.7 ▼	1.9	1.3	*Jaunes d'oeufs Total*
Further Processed Eggs	6.0 ▲	2.8 ▲	5.4	2.3	*Préparations à base d'oeufs*
Shell Eggs (liquid equiv)	14.0 ▼	14.9 ▼	21.3	19.7	*Oeufs en coquille* (équivalent liquide)
Total	28.7 ▼	27.1 ▼	35.0	30.7	Total

▼▲: denotes an increase/decrease from last year's value • indique une augmentation/diminution comparativement à l'année dernière

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Industrial Product Volumes
Quantité de produits industriels

Prov	2006 (000 dozens) (000 douzaines)	2005 (000 dozens) (000 douzaines)	2006/2005 Change Changement (%)
BC	11,871	11,235	5.7
AB	7,749	8,677	-10.7
NT	1,041	1,346	-22.7
SK	5,817	3,725	56.2
MB	25,914	26,328	-1.6
ON	41,346	42,508	-2.7
QC	16,185	13,845	16.9
NB	3,854	2,921	32.0
NS	6,623	6,438	2.9
PE	1,613	1,444	11.7
NL	3,975	3,627	9.6
Canada	125,986	122,094	3.2

Source : CEMA • OCCO

Processed Egg Production
Production d'oeufs de transformation

(000 000 kg - liquid equivalent / équivalent liquide)

	2006	2005	2004	2003	2002	
Whole Egg	55.8	54.0	52.8	54.4	58.2	*Oeufs entiers*
Yolk	12.7	13.2	11.3	12.4	15.7	*Jaune*
Albumen	26.8	26.1	22.1	23.9	29.3	*Albumen*
Total	95.3	93.2	86.2	90.7	103.2	*Total*

Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Eggs Broken for Processing
Oeufs cassés destinés à la transformation

(000 000 dozens / douzaines)

	2006	2005	2004	2003	2002	
Eggs	163.39	159.46	147.31	143.33	161.14	*Oeufs*

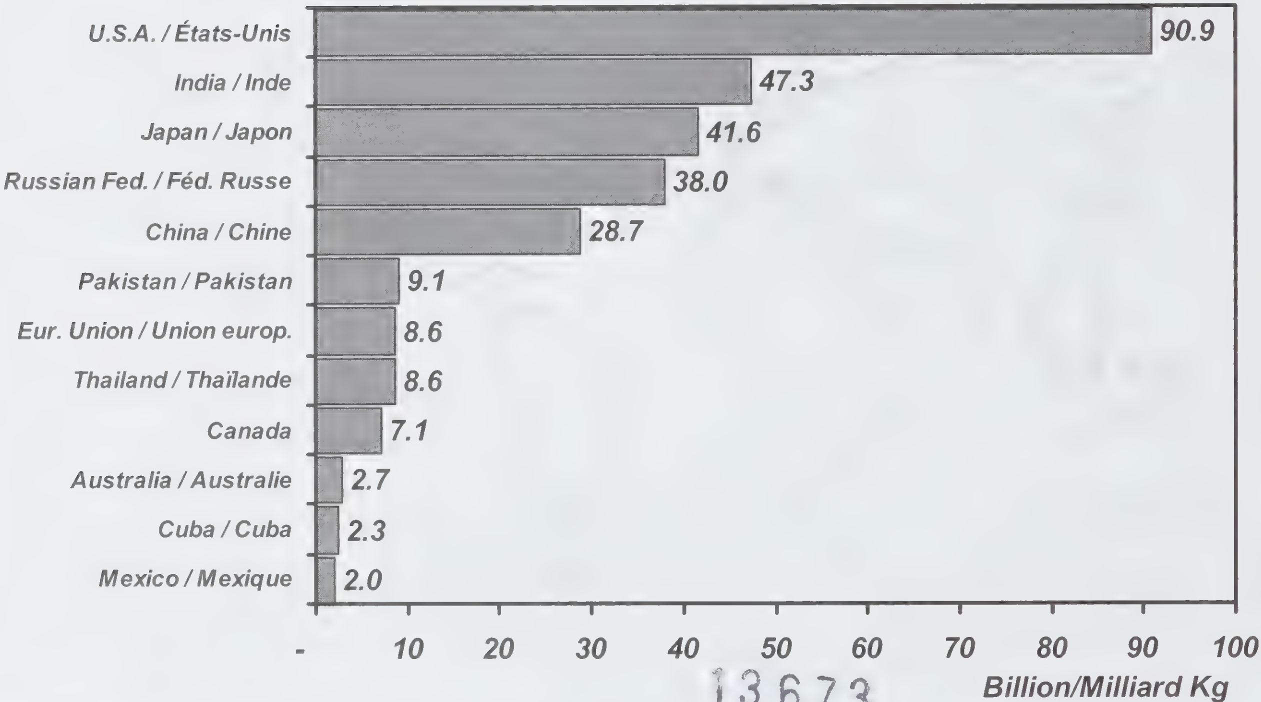
Source : Agriculture and Agri-Food Canada • Agriculture et Agroalimentaire Canada

Per Capita Consumption of Shell and Processed Eggs
Consommation d'oeufs en coquille et transformés par personne
(dozens per person / douzaines par personne)

	2006	2005	2004	2003	2002	
Processed Egg	4.1	3.7	3.4	3.8	3.9	*Oeufs transformés*
Shell Egg	11.5	11.9	11.8	11.8	11.5	*Oeufs en coquille*
Total Domestic Consumption	15.6	15.6	15.2	15.6	15.4	*Production intérieure totale*

Source : Statistics Canada and CEMA • Statistique Canada et OCCO

Major Egg Producing Countries
Principaux pays producteurs d'oeufs
2006



13673

Source : Food and Agriculture Organization of the United Nations • Organisation des Nations Unies pour l'alimentation et l'agriculture

Industry Contacts / Contacts de l'industrie

Canadian Egg Marketing Agency
Office canadien de commercialisation des oeufs
1501 - 112, rue Kent Street
Ottawa, Ontario
K1P 5P2
Tel./Tél. : (613) 238-2514
Fax/Téléc. : (613) 238-1967
www.canadaegg.ca
Contact : Tim Lambert, Chief Executive Officer / chef de la direction

Canadian Turkey Marketing Agency
Office canadien de commercialisation du dindon
202 - 7145, avenue West Credit Avenue
Building 1, édifice 1
Mississauga, Ontario
L5N 6J7
Tel./Tél. : (905) 812-3140
Fax/Téléc. : (905) 812-9326
www.canadianturkey.ca
Contact : Phil Boyd, Executive Director / directeur exécutif

Chicken Farmers of Canada
Les Producteurs de poulet du Canad
1007 - 350, rue Sparks Street
Ottawa, Ontario K1R 7S8
Tel./Tél. : (613) 241-2800
Fax/Téléc. : (613) 241-5999
www.chicken.ca
Contact : Mike Dungate, General Manager / directeur général

Canadian Broiler Hatching Egg Marketing Agency
Office canadien de commercialisation des oeufs d'incubation de poulet à chair
1101 - 75, rue Albert Street
Ottawa, Ontario K1P 5E7
Tel./Tél. : (613) 232-3023
Fax/Téléc. : (613) 232-5241
www.cbhema.com
Contact : Errol Halkai, General Manager / directeur général
Note: now referred to as the Canadian Hatching Egg Producers
maintenant connu comme les Producteurs d'oeufs d'incubation du Canada

Canadian Poultry and Egg Processors Council
Conseil canadien des transformateurs d'oeufs et de volailles
400 - 1545, avenue Carling Avenue
Ottawa, Ontario
K1Z 8P9
Tel./Tél. : (613) 724-6605
Fax/Téléc. : (613) 724-4577
www.cpepc.ca
Contact : Robin Horel, President and CEO / président et chef de la direction

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